25-M-0249	**In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio.**

Low- to-Moderate Income Energy Efficiency and Building Electrification Portfolio Implementation Plan

Filed November 2, 2026

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Low- to Moderate-Income Energy Efficiency and Building Electrification Implementation Plan - Revision History

November 2, 2026

Sub-Portfolio	Sub-Portfolio-Wide	Section in Plan
Multifamily Residential	Updated activity on common multifamily platform and project database.	Section 3.1.1
Multifamily Residential	Combined Pre-weatherization sections from Section 3.3 and 3.4, to define eligible measures at the sub-portfolio level.	Section 3.1.2

Sub-Portfolio	Program Offerings	Section in Plan
1-4 Family Res.	EmPower+ - clarifying edits made to Eligible Measures, Direct Install Measures program, Pre-Weatherization Health & Safety, Federal and State funding, and Implementation Milestones Table.	Section 2.2.
Multifamily Residential	Technical Assistance - clarifying edits made throughout the section, and updated Implementation Milestones Table.	Section 3.2
Multifamily Residential	AMEEP – clarifying edits made throughout the section, removed pre-weatherization health and safety section and updated Implementation Milestones Table.	Section 3.3
Multifamily Residential	AMP-Up - clarifying edits made throughout the section, removed pre-weatherization health and safety section, and updated Implementation Milestones Table.	Section 3.4
Multifamily Residential	Housing Agency Partnerships - updated Implementation Milestones Table.	Section 3.5
Multifamily Residential	Affordable New Construction - clarifying edits made throughout the section, added description of New Efficient Homes New York program and updated Implementation Milestones Table.	Section 3.6
General Awareness and Education	General Marketing - clarifying edits made throughout the section, and updated Implementation Milestones Table.	Section 4.3
General Awareness and Education	Disadvantaged Community Engagement - clarifying edits made throughout the section, added description of Translation and Interpretation services, and updated Implementation Milestones Table.	Section 4.4

Sub-Portfolio	Other Plan Updates	Section in Plan
Introduction	Money Out The Door - updated text with additional detail on the activities to track, report, and refine the calculation of MOTD progress.	Section 1.2.4

Sub Portfolio	Budgets & Benefits Forecast	Section in Plan
All	This filing contains NYSERDA's required annual update to EEBE budgets and benefits plans (the forecast). Known history is incorporated, and refinements to future forecasts made to reflect the latest understanding of progress and anticipated implementation for portfolio and program investments. Tables throughout the plan have been updated with adjustments to both timing and totals where applicable.	Multiple (Main Sections and Appendices)

All	Since the previous filing, NYSERDA has updated its non-program cost allocation approach to be consistent across both LMI and Non-LMI EEBE Portfolios which includes provision for Workforce programming as well. These updates are reflected in Appendix C	Appendix C
1-4 Family Residential, Multifamily Residential	Benefits forecast refinements have increased expected energy savings for both 1-4 Family and Multifamily Sub-Portfolios as result of added clarity around program activities and implementation. Table 3 conveys the portfolio-wide impacts while subsequent tables within each Sub-Portfolio section provide Program-level detail for the updates.	Section 1.2 Section 2.2 Section 3.2 Appendix B Appendix C
1-4 Family Residential	1-4 Family Benefits Forecast • Lifetime MMBtu-e total updated to 27.0M (previously 24.9M)	Section 2.1 Appendix B Appendix C
Multifamily Residential	Multifamily Benefits Forecast • Lifetime MMBtu-e total updated to 45.2M (previously 40.8M) • Participants (Dwelling Units) updated to 250K (previously 254K) • Participants (Buildings) updated to 6,116 (previously 6,151)	Section 3.1 Appendix B Appendix C

January 30, 2026

Budgets & Benefits Forecast	**Section in Plan**
Incorporated modifications that are responsive to the Compliance Letter filed on 12/22/2025 in Case 25-M-0249. Revisions include reorganization for consistency throughout the document, additional detail on program budgets, energy savings, incentive structure, leveraged funds, program manuals, implementation milestones for 2026, and evaluation, measurement and verification activities.	Multiple

February 2, 2026

Budgets & Benefits Forecast	**Section in Plan**
Addressed errors in section reference links and made minor formatting and grammatical edits.	Multiple

February 9, 2026

Budgets & Benefits Forecast	**Section in Plan**
Updated Eligibility Criteria for AMP Up	Page 55

June 1, 2026

Budgets & Benefits Forecast	**Section in Plan**
Incorporated modifications that are responsive to the Compliance Letter filed on 3/18/2026 in Case 25-M-0249. Revisions include removal of references to the Common Metrics Framework and evaluation, measurement and verification protocols, additional detail on the Affordable Multifamily Common Intake Platform and Shared Project Database, improved clarity and delineation of the various opportunities for stakeholder engagement, and the reassignment of funding associated with the Customer Referral Plan as a program implementation cost.	Multiple

SECTION ONE: STATEWIDE LOW-TO MODERATE-INCOME PORTFOLIO OVERVIEW

1.1. Regulatory/Policy Background/Context

On May 15, 2025, the New York State Public Service Commission (PSC or Commission) issued the *Order Authorizing Low- to Moderate-Income Energy Efficiency and Building* Electrification *Portfolios for 2026-2030*[1] (LMI Order). The LMI Order approves with modifications proposals by the New York State Energy Research and Development Authority (NYSERDA), as well as Consolidated Edison of New York, KeySpan Gas East Corporation d/b/a National Grid (KEDLI) and The Brooklyn Union Gas Company d/b/a National Grid NY (KEDNY)[2] (collectively, Downstate Utilities or AMEEP Administrators), collectively referred to as Program Administrators, and authorizes budgets for the 2026-2030 Low-to-Moderate Income (LMI) energy efficiency and building electrification (EE/BE) portfolios for the 2026-2030 period. Additionally, the Commission issued its *Order Authorizing Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030*[3] (Non-LMI Order), approving proposals with modifications from NYSERDA and the major investor-owned utilities (Utilities), and authorizing budgets for respective Non-Low- to Moderate Income (Non-LMI) EE/BE portfolios.

The Program Administrators submit this LMI EE/BE Portfolio Implementation Plan in compliance with the LMI Order.

1.1.1. Policy Actions by the Commission, Department of Public Service, and Program Administrators

On July 20, 2023, the Commission issued its Order Directing Energy Efficiency and Building Electrification Proposals (Order Directing Proposals)[4] adopting a Strategic Framework and establishing priorities for ratepayer funding, as well as providing overall guidance and directing the Program Administrators to file proposals for the future EE/BE portfolios. The Commission also adopted a 'budget-bounded' approach to EE/BE funding, setting a $1 billion annual expenditure cap across LMI and Non-LMI portfolios.

On November 1 and 2, 2023, NYSERDA and the utilities individually filed Non-LMI and LMI EE/BE Portfolio Proposals, providing details on their proposed programs, strategies, and regulatory structures for the 2026-2030 period.

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[1] Case 25-M-0249, *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Order Authorizing Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolio for 2026-2030 (issued May 15, 2025).

[2] KeySpan Gas East Corporation d/b/a National Grid and The Brooklyn Union Gas Company d/b/a National Grid NY ("KEDLI") will be collectively referenced in this document as "National Grid." Where a program or detail refers solely to one operating company / service territory, the acronym will be used (KEDLI or KEDNY).

[3] Case 25-M-0248, *In the Matter of the 2026-2030 Non-Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios*, Order Authorizing Non-Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios (issued May 15, 2025).

[4] Case 18-M-0084, *In the Matter of a Comprehensive Energy Efficiency Initiative*, Order Directing Energy Efficiency and Building Electrification Proposals (issued July 20, 2025).

On May 15, 2025, the Commission issued the LMI Order and the Non-LMI Order authorizing LMI and Non-LMI EE/BE Portfolios for 2026-2030, as well as budgets for the respective EE/BE portfolios.

On December 22, 2025, the Department of Public Service (DPS) issued a Preliminary LM EE/BE IP Compliance Letter[5] (December 2025 Compliance Letter) granting conditional approval of the LMI EE/BE Plan filed on October 31, 2025, and directing modifications. The Updated LMI EE/BE Portfolio Implementation Plan filed on January 30, 2026, with subsequent revisions filed on February 2, 2026, and February 9, 2026, incorporated the changes outlined in the December 2025 Compliance Letter.

On March 18, 2026, DPS issued the LMI EE/BE Implementation Plan Compliance Letter[6] (March 2026 Compliance Letter), permitting the Program Administrators to begin to implement the activities outlined in the LMI Implementation Plan, with caveats noted in the letter. The Program Administrators filed a revised LMI EE/BE Portfolio Implementation Plan on June 2, 2026, to incorporate the directives outlined in the March 2026 Compliance Letter.

On August 11, 2026, DPS issued the LMI EE/BE Implementation Plan Compliance Letter[7] (August 2026 Compliance Letter), directing the Program Administrators to provide greater detail in the Record of Revision, and to finalize budgets for the Affordable Multifamily Common Intake Platform and Shared Project Database.

1.1.2. Implementation Plan and Program Manuals

As directed by the LMI Order, the Program Administrators will update this LMI EE/BE Portfolio Implementation Plan on an annual basis. The LMI Implementation Plan may be updated as needed to address substantive modifications to the portfolio programs, budgets and targets and will be filed at least 45 days prior to the modifications taking effect. In addition, changes to program incentives will be approved by DPS Staff (Staff) before the change is made.

Program Manuals are made available to provide detailed information and specifications regarding measure eligibility and installation, program incentives, and participation requirements for the EmPower+ program for 1-4 unit homes, as well as for the multifamily programs: the Affordable Multifamily Energy Efficiency Program (AMEEP) and the Affordable Multifamily Program Upstate (AMP Up). Program Manuals have been made available through a public filing and published on the Program Administrators' websites.

[5] Case 25-M-0249- In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio; LMI IP Compliance Letter (filed December 22, 2025)
[6] Case 25-M-0249- In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio; LMI EE/BE Implementation Plan Compliance Letter (filed March 18, 2026)
[7] Case 25-M-0249- In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio; LMI EE/BE Implementation Plan Compliance Letter (filed August 11, 2026)

1.2. Statewide LMI Portfolio Description, Context, and Key Objectives

1.2.1. Authorized Budgets and Savings Targets

For NYSERDA, the Commission has assumed a simple annualized proration of the cumulative budget and target metrics distributed evenly across seven years as provided in Table 3 for the purposes of measuring ongoing progress within the program period.[8]

For the Downstate Utilities, the Commission has annualized and prorated the cumulative budget and target metrics distributed evenly across five years as provided in Table 4, for the purposes of measuring ongoing progress within the program period. This approach will enable stakeholders to compare the performance of PAs on a consistent basis.

The metrics included in Table 1 provide NYSERDA's planned budgets and energy savings for the LMI Portfolio. The budget forecast recognizes that some relatively limited expenditures are expected to lag beyond 2032, including those associated with evaluation, measurement and verification, and administration.

The metrics included in Table 2 provide the Downstate Utilities' planned budgets and energy savings for the LMI Portfolio.

This Implementation Plan includes a budget of approximately $1.57 Billion in funding allocations across all the Program Administrators from 2026-2034, with estimated 144 million lifetime million British Thermal Units equivalent (LMMBtu-e), while serving 1,070,000 participants. Appendix B includes a portfolio summary.

[8] In the *Order Authorizing Non-Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 127, the Commission acknowledges there will likely be a ramp up in performance over time, such that program performance may appear to fall short from annual authorized budgets and targets, in the early years.

Table 1. NYSERDA Authorized Budgets and Ordered Targets

Fuel-Type Funding Source	Sub-Portfolio (Funding)	PSC Authorized Average Annual LMI Portfolio Budget	PSC Authorized Average Annual LMI Portfolio Savings Target (LMMBtu-e)	PSC Authorized LMI Portfolio Budget: 2026-2030	PSC Authorized LMI Portfolio Savings Target: 2026-2030 (LMMBtu-e)
Electric/Gas	1-4 Residential	63,642,857	9,378,894	445,500,000	65,652,257
	Multifamily Residential	45,171,429		316,200,000	
	General Awareness & Education	7,471,429		52,300,000	
	Workforce Development	4,285,714		30,000,000	
	Administration	17,142,857		120,000,000	
	EM&V	3,428,571		24,000,000	
	Cost Recovery Fee	1,714,286		12,000,000	
Total		**142,857,143**	**9,378,894**	**1,000,000,000**	**65,652,257**

Note: All NYSERDA Budgets and Benefits are assumed to be split 50/50 between electric and gas fuel-type funding sources. Average Annual figures are assessed for NYSERDA over seven years (2026-2032) acknowledging that contract commitments must be made within the five-year period of 2026-2030.

Table 2. Downstate Utilities Authorized Budgets and Ordered Targets

Fuel-Type Funding Source	Program Administrator	PSC Authorized Average Annual LMI Portfolio Budget	PSC Authorized Average Annual LMI Portfolio Savings Target (LMMBtu-e)	PSC Authorized LMI Portfolio Budget: 2026-2030	PSC Authorized LMI Portfolio Savings Target: 2026-2030
Electric	Con Edison	$21,929,907	664,202	$109,649,536	3,321,012
Electric Total		**$21,929,907**	**664,202**	**$109,649,536**	**3,321,012**
Gas	Con Edison	$69,560,292	4,868,911	$347,801,458	24,344,553
Gas	KEDLI	$3,872,840	260,995	$19,364,200	1,304,973
Gas	KEDNY	$18,345,734	1,155,807	$91,728,670	5,779,033
Gas Total		**$91,778,866**	**$6,285,713**	**$458,894,328**	**$31,428,559**
Grand Total		**$113,708,773**	**$6,949,915**	**$568,543,864**	**$34,749,571**

Table 3. NYSERDA Portfolio- Level Program Spending, Savings, & Participants Planned by Sector and Year*

NYSERDA LMI Plan	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**95,728**	**127,158**	**157,100**	**172,875**	**210,509**	**56,179**	**24,451**	**0**	**0**	**844,000**
1-4 Family Residential	64,820	87,867	88,347	88,347	88,347	27,772	0	0	0	445,500
Multifamily Residential	30,418	32,561	49,970	61,198	96,419	23,683	21,951	0	0	316,200
Multisector										
General Awareness & Education	25	3,784	13,658	16,216	18,516	102	0	0	0	52,300
Workforce (LMI)	465	2,946	5,125	7,115	7,227	4,622	2,500	0	0	30,000
Non-Program Budget Plan ($ 000s)	**12,864**	**21,997**	**26,881**	**28,753**	**28,610**	**20,958**	**13,833**	**1,397**	**709**	**156,000**
Total Budget Plan ($ 000s)	**108,592**	**149,155**	**183,980**	**201,628**	**239,119**	**77,137**	**38,284**	**1,397**	**709**	**1,000,000**

Lifetime MMBtu-e Energy Savings (000s)	**6,264**	**8,676**	**10,585**	**12,580**	**20,229**	**9,948**	**3,856**	**0**	**0**	**72,138**
1-4 Family Residential	5,814	4,979	4,979	4,979	4,979	1,245	0	0	0	26,975
Multifamily Residential	450	3,697	5,606	7,601	15,250	8,703	3,856	0	0	45,163
Participants (Dwelling Units)	**10,925**	**39,542**	**50,403**	**55,657**	**79,795**	**39,572**	**20,297**	**0**	**0**	**296,191**
1-4 Family Residential	6,907	9,204	9,204	9,204	9,204	2,300	0	0	0	46,023
Multifamily Residential	4,018	30,338	41,199	46,453	70,591	37,272	20,297	0	0	250,168
Participants (Buildings)	**47**	**653**	**890**	**1,107**	**2,103**	**847**	**469**	**0**	**0**	**6,116**
Multifamily Residential	47	653	890	1,107	2,103	847	469	0	0	6,116

*Workforce Development program metrics can be found in the 2026-2030 EE/BE Workforce Development Implementation Plan.[9] Funding is included here to ensure full view of NYSERDA LMI authorized budget. Additional detail on budgets and benefits plans can be found in Appendix C.

[9] Case 25-M-0249, *2026-2030 Energy Efficiency and Building Electrification Workforce Development Implementation Plan* (November 2, 2026) page 3, Sub-Portfolio-Level Program Spending and Participants Forecast by Year.

Table 4. Downstate Utilities Portfolio- Level Program Spending, Savings, & Participants Planned by Sector and Year[10]

Utility LMI Plan	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential Program Budget Plan ($)	**$ 66,964,352**	**$ 103,394,074**	**$ 108,458,743**	**$ 118,194,540**	**$ 130,254,807**	**$ 527,266,516**
Con Edison	$ 53,042,994	$ 78,378,597	$ 86,967,202	$ 96,356,087	$ 107,860,278	$ 422,605,159
KEDLI	$ 1,189,482	$ 3,989,518	$ 4,170,860	$ 4,352,201	$ 4,505,417	$ 18,207,477
KEDNY	$ 12,731,877	$ 21,025,959	$ 17,320,681	$ 17,486,252	$ 17,889,112	$ 86,453,880
Other Program Budget Plan ($)	**$ 7,208,685**	**$ 7,764,670**	**$ 8,232,900**	**$ 8,751,755**	**$ 9,319,339**	**$ 41,277,348**
Con Edison	$ 6,037,671	$ 6,512,861	$ 6,949,807	$ 7,416,476	$ 7,929,020	$ 34,845,835
KEDLI	$ 210,630	$ 220,675	$ 231,026	$ 241,695	$ 252,697	$ 1,156,723
KEDNY	$ 960,384	$ 1,031,134	$ 1,052,066	$ 1,093,584	$ 1,137,621	$ 5,274,790
TOTAL BUDGET PLAN ($)	**$ 74,173,037**	**$ 111,158,744**	**$ 116,691,642**	**$ 126,946,295**	**$ 139,574,146**	**$ 568,543,864**
Multifamily Residential Lifetime MMBTu-e Savings	**14,688,691**	**13,787,275**	**13,774,584**	**14,434,128**	**15,198,606**	**71,883,284**
Con Edison	12,789,641	11,301,371	11,986,754	12,615,656	13,333,329	62,026,751
KEDLI	68,271	331,243	287,870	301,812	315,777	1,304,973
KEDNY	1,830,780	2,154,660	1,499,960	1,516,660	1,549,500	8,551,560
Sum of Participants (Dwelling Units)	**140,649**	**145,651**	**150,942**	**161,137**	**173,687**	**772,066**
Con Edison	126,177	123,691	133,302	143,257	155,327	681,754
KEDLI	168	1,380	1,440	1,440	1,500	5,928
KEDNY	14,304	20,580	16,200	16,440	16,860	84,384
Sum of Participants (Projects/buildings)	**2,221**	**1,952**	**2,003**	**2,135**	**2,297**	**10,607**
Con Edison	1,618	1,586	1,709	1,837	1,991	8,740
KEDLI	7	23	24	24	25	103
KEDNY	596	343	270	274	281	1,764

1.2.2. Key Objectives of the Portfolio

As provided in the LMI Order, the Commission's policy objectives for the LMI EE/BE portfolio[11] include:

- *Reduce energy consumption and cost for households experiencing the greatest energy burden.* Through coordination, experience, and stakeholder engagement, the Program Administrators will offer programs in the 1-4 family residential and affordable multifamily sub-portfolios that reduce energy consumption, minimize project deferrals, and improve energy affordability for households. As further described in the Customer Referral Plan, utilities and NYSERDA have taken steps to prioritize EmPower+ program referrals to improve conversion rates and serve utility customers with high energy usage.[12]
- *Maximize the impact of ratepayer funds through effective coordination, the leveraging of other funding sources, and administrative efficiencies.* NYSERDA will leverage additional State and Federal funding sources where applicable to maximize the impact of ratepayer funds, expand the reach of programs offered, and limit the number of projects that are deferred due to pre-weatherization issues. The Program Administrators will actively coordinate with each other and with the Department of Public Service throughout the program period to identify and implement administrative efficiencies.

[10] The Utilities have included labor under sub-portfolio budgets. Please see Appendix B.
[11] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 34, the Order summarizes the Commission's policy objectives for achieving the greatest impact with the funding available, in authorizing the 2026-2030 LMI Portfolio.
[12] Case 25-M-0249, *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Customer Referral Plan (September 3, 2026).

- *Simplify participation and reduce administrative burden for applicants and contractors.* The programs within the LMI Portfolio are designed to reduce administrative burden for all participants through effective coordination amongst the Program Administrators and other State agencies as applicable, as well as by streamlining the outreach and enrollment of customers through the project referral and application processes.
- *To seek and incorporate feedback from market participants in the design and implementation of programs.* Stakeholder input was provided throughout the development of the LMI EE/BE portfolio, and Stakeholder engagement will continue to be a fundamental component of the program design and administration processes. The Program Administrators will regularly engage stakeholders to seek input and communicate program updates.
- *Enhance transparency in program and portfolio performance.* The Program Administrators will work with DPS Staff to incorporate Staff guidance on collecting input, communicating performance, and providing transparent documentation and resources.
- *Provide clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets*. The Program Administrators seek to provide timely and accessible information to market participants through improved communication, reporting of metrics, and regular updates to this LMI EE/BE Portfolio Implementation Plan and program materials.

The Program Administrators will seek to meet all of the Commission's policy objectives through the implementation of the LMI EE/BE portfolio and the programs described herein. In addition to this LMI EE/BE Portfolio Implementation Plan, the Program Administrators filed a Joint Customer Platform Utility Integration Plan[13] on November 14, 2025, and will subsequently file performance management internal control processes.[14] Furthermore, individual program manuals will be developed for the EmPower+, and Affordable Multifamily Programs administered by NYSERDA and the AMEEP program administered by Downstate Utilities.

1.2.3. Fuel Type

The programs delivered through the 2026-2030 LMI Portfolio's energy efficiency efforts are designed to reduce energy consumption and increase the use of clean energy resources and technologies while maintaining affordability for households. The Commission supports a fuel-neutral approach for the LMI Portfolio and requires that only funds from electric customers shall be used to support weatherization activities within buildings that heat with a delivered fuel or steam.[15]

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[13] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 161, the Commission orders NYSERDA and the Joint Utilities to file a Joint Customer Platform Utility Integration Plan, as discussed in the body of the Order.
[14] Case 25-M-0249, *The Low- To Moderate-Income Energy Efficiency and Building Electrification Performance Management Framework* (issued September 12, 2025) page 20, the Department of Public Service direct Program Administrators to develop an internal control process to facilitate performance management of LMI programs.
[15] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 42, the Order reiterates the Commission's policy that buildings that heat with a delivered fuel can access EE/BE funds if they are an electric customer that contributes to EE/BE collections.

1.2.4. Managing the MOTD Metric

NYSERDA

NYSERDA will design and execute programs that will maximize funding provided to projects and other market activities that constitute money-out-the-door (MOTD), with the goal of achieving 80 percent by 2030. NYSERDA will do this by maintaining an appropriate balance between the money spent on backend program implementation, including labor, administration, Evaluation, Measurement and Verification (EM&V), and other overhead costs versus the money provided directly to support customers or installation contractors in implementing EE/BE projects.

As LMI EE/BE portfolio programs are launched in the market in 2026 and 2027, NYSERDA will continue to review program implementation costs and incentive rates, through budget systems tracking and forecasts, to continue to improve this metric throughout the funding period.

National Grid

Consistent with Commission guidance regarding MOTD performance, National Grid is implementing a strategy designed to maximize the flow of EE/BE funding to support customer adoption of energy efficiency measures. National Grid will pursue operational efficiencies through consolidated implementation vendors and standardized program processes. Priority will be placed on maintaining a robust project pipeline, accelerating program growth, and deploying funds to Strategic Measures that advance the Commission's objectives.

National Grid will continue its ongoing review of MOTD performance. These reviews will identify opportunities to improve participation and reduce administrative costs. Through these actions, National Grid intends to maintain strong portfolio execution, increase customer participation, and continuously work toward achieving the Commission's 80 percent MOTD goal by 2030.

Con Edison

The Company takes a multi-pronged approach to maximize MOTD by managing non-incentive costs such as those related to staffing, implementation services and marketing, while growing programmatic activity resulting in increased incentive spending. Implementation services include agreements with implementation contractors and other vendors to provide cost-effective program management, engineering, inspection and QA/QC support. As part of managing costs for implementation services, the Company decides which services to procure through outside vendors and which to fulfill using internal resources.

For example, the Company performs most program design and planning work in-house and implements marketing campaigns in concert with the Company's other external-facing groups to maximize messaging effectiveness while remaining consistent with specific EE-BE programmatic goals.

Finally, the Company will improve the MOTD metric through portfolio growth because not all non-incentive expenditures scale in proportion to increased program activity. The Company will grow program activity in alignment with the savings targets and associated incentive expenditure by cultivating and maintaining an active contractor network, refining program design, and driving customers awareness and action.

In sum, the Company actively monitors its MOTD performance with an eye on ongoing operational improvements to both reduce administrative costs and grow high-performing incentive offerings.

1.3. Portfolio-Wide Eligibility Criteria

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

In the LMI Order, the Commission adopted a revised income eligibility standard for the EmPower+ program within the 1-4 family sub-portfolio, requiring eligibility for low-income to be expanded to at-or-below 60 percent of SMI or AMI, whichever is higher. This change will result in more households being eligible for the EmPower+ program's low-income incentive in the Downstate region.

Furthermore, as directed by the Commission, the Program Administrators will work with DPS Staff to effectuate more discrete tracking of LMI program information related to budgets, expenditures, and benefits between "low" and "moderate" income customers, to integrate reporting of that information into regular reporting schedules.

1.4. Portfolio-Wide Program Design Strategies

As noted by the Commission in the LMI Order, decarbonizing the buildings sector will require creative solutions to overcome the barriers to energy efficiency and building electrification for the LMI sector.[17] LMI households and affordable housing owners face barriers to adoption of energy efficiency and weatherization upgrades that include limited access to capital to fund upgrades; deferred maintenance, structural deficiencies, and health and safety issues that can prevent upgrades; split incentives in rental properties; and fragmented program delivery that can create administrative burden for applicants.

Installation costs, the potential for increased energy burdens, and limitations on available data and insights on electrification in the LMI market segment, represent additional challenges to heat pump deployment for LMI households and in affordable housing.

The Program Administrators will utilize the lessons learned from the Energy Affordability Guarantee Pilot[18] and the guiding principles outlined in the LMI Order to advance strategic electrification and address early-stage opportunities to achieve the Commission's priorities of reducing fossil fuel combustion and advancing energy affordability for lower-income households.

Guiding Principles from LMI Order:

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[16] 2019 American Community Survey: https://www.census.gov/programs-surveys/acs

[17] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 80-83, the Commission provides four principles to guide the implementation of electrification in the LMI market segment through the 2026-2030 EE/BE portfolio.

[18] Case 14-M-0565, *Proceeding on Motion of the Commission to Examine Programs to Address Energy Affordability for Low Income Utility Customers*, Order Adopting Enhanced Energy Affordability Policy and Directing Utility Filings (issued July 17, 2025).

1) Prioritize Weatherization and Energy Efficiency.
2) Focus on Energy Affordability.
3) Target the Conversion of Delivered Fuels Customers.
4) Align Programs and Policies to Enable Affordable Electrification.

NYSERDA's twelve Regional Clean Energy Hub (Hub) Contractors, as local resources, comprised of community-based organizations, are designed to connect residents with resources for energy efficiency and workforce development opportunities. In addition to the above-mentioned challenges to weatherization, energy efficiency, and electrification, Hubs have also identified barriers to EE/BE program participation in Disadvantaged Communities, including a propensity of deferred maintenance, lack of awareness of program requirements and benefits, limited access to capital, a high proportion of rental units, as well as a need for multilingual informational materials. Through the development of Regional Assessment and Barriers Analysis reports[19] which offer impactful strategies for improving outreach and education in Disadvantaged Communities, Hubs will continue to be essential stakeholders in the development and outreach of programs in the LMI Portfolio, to ensure that barriers to program participation are addressed.

Some strategies the Program Administrators will use to address these barriers include the use of pre-weatherization funding to understand deferred maintenance issues in homes where health and safety, structural, or other issues that may represent barriers to weatherization work have been identified and to coordinate with the NYS Homes and Community Renewal (HCR) to direct projects that exceed NYSERDA's available resources to applicable home repair programs. Additionally, to increase participation of rental properties in the LMI market segment, the Program Administrators will conduct outreach to building owners through the Hubs, and in the 1-4 family residential sector, NYSERDA will explore opportunities to utilize virtual energy audits and a renter-focused voucher offer for the purchase of energy efficient products that can be directly installed by the occupants.[20]

1.5. Measure Eligibility

In the LMI Order, the Commission's directives present an overarching theme of balancing energy affordability with increasing access to energy efficient and clean energy solutions. In the Order Directing Proposals, the Strategic Framework focuses the composition of the portfolios more directly to achieve comprehensive efficiency projects and whole-building electrification. However, in the LMI Order the Commission approved minor modifications to the Strategic Framework to ensure that ratepayer funding is deployed in a targeted way that is aligned with the objectives of the LMI Portfolio. The Program Administrators will leverage the Strategic Framework in determining measure eligibility to maximize the impact of ratepayer funds through a prioritization of energy efficiency and weatherization work scopes.

The Program Administrators are required to allocate a minimum of 85 percent of portfolio budgets to measures or programs that are strategic, and up to 15 percent of portfolio budgets to neutral measures or

[19]Case 25-M-0248- *In the Matter of the 2026-2030 Non Low-to Moderate-Income Energy Efficiency and Building Electrification Portfolio* and Case 25-M-0249- *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio;* Clean Energy Hubs RABA Reports (filed January 29, 2026)
[20] NYSERDA launched the Appliance Upgrade Program in 2024 with federal funding from the Inflation Reduction Act's Home Energy Rebates

programs.[21] Modifications to the Strategic Framework provided in the LMI Order include to allow certain measures that contribute to the energy affordability for the household to be considered "neutral" measures, such as lighting (through 2027), refrigerator replacements, and measures directly installed by a contractor such as low-flow shower heads, thermostats, and pipe insulation. Additionally, gas efficiency measures with an effective useful life of less than 6 years, and gas combustion systems may be considered neutral in limited circumstances.

1.5.1. Electrification

The LMI Order adopts definitions for Full, Partial, Phased, and Hybrid Electrification projects. For single family homes, the Commission only considers Full Electrification as a strategic measure. However, for larger buildings, phased electrification approaches shall be allowed, where the heating needs of the portion of the building that is being electrified are fully satisfied by design. The Commission considers phased electrification approaches to be strategic for affordable multifamily buildings. With this, the program offerings described in this Implementation Plan provide specific criteria and use cases for when phased electrification projects will be considered eligible for program incentives.

Building upon investments made in the previous Clean Energy Fund (CEF) period to develop a "heat pump ready" envelope specification under the Comfort Home pilot, as well as lesson learned through the implementation of incentives for heat pumps installed by the EmPower+ program and advanced modeling to predict the impact of weatherization on heating loads, NYSERDA has developed specifications that will be applicable to the full range of 1-4 housing types and climates existing in NYS. The specifications were launched on March 18, 2026, and are included in the EmPower+ Program Manual, to form the basis for the pre-electrification insulation requirements for both the EmPower+ and Comfort Home (closing December 31, 2026) programs for consistency across portfolios and to simplify contractor participation. The goal is to establish a target envelope performance specification aimed at reducing energy consumption, maximizing the impact of ratepayer funds by minimizing the first cost of installing a heat pump system, improving comfort conditions in the home, and optimizing operational affordability.

1.5.2. Pre-Weatherization Health and Safety

The LMI Order also allows for up to 10 percent of the program budget to be used for the remediation of health and safety and structural barriers as part of a pre-weatherization work scope. Per the LMI Order, the Program Administrators will limit use of these funds to LMI customers who have applied to EE/BE programs and have been, or otherwise would be, deferred from receiving services due to health and safety barriers encountered, as well as track and report the number of projects deferred and the reasons for those deferrals. Applicable pre-weatherization health and safety measures are outlined for the EmPower+ program below in Section 2.2.6. Applicable pre-weatherization health and safety efforts are outlined for the multifamily residential portfolio below in Section 3.

1.6. Financing and Leveraged Funds

[21] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) Appendix A, summarizes proposed modifications and determinations to the Strategic Framework, and states that the Program Administrators shall allocate a minimum of 85 percent of portfolio budgets to Strategic measures or programs, up to 15 percent of portfolio budgets to Neutral measures or programs, and no funding to Non-Strategic measures or programs.

The Program Administrators will continue to seek opportunities to leverage other State and federal funding sources to help increase the scope and reach of programs, as well as to provide consistency and certainty to contractors and households participating in ratepayer programs. As the Order directs Program Administrators to ensure program offerings are available through December 31, 2030, NYSERDA and the Downstate Utilities will seek out additional State and Federal funding sources to complement ratepayer funds while also actively managing program spending to guard against program budgets running out of funding prior to the end of 2030. The budget-bounded requirement for EE/BE funding provides the flexibility needed for the Program Administrators to be able to leverage additional funding opportunities while maintaining a level of budget certainty through 2030. This budget certainty is critical to program participants and contractors, for building a pipeline of projects, and to minimize market volatility.

The Regional Greenhouse Gas Initiative (RGGI) is a market-based regulatory program designed to reduce greenhouse gas emissions. RGGI is a cooperative effort among the states of Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Rhode Island, and Vermont to cap and reduce emissions from the power sector. NYSERDA invests New York State's RGGI auction proceeds strategically across disciplines, economy wide, in a way that supports comprehensive strategies that best advance the emission reduction goals of the program and the State. As outlined in the RGGI Operating Plan[22] approved by NYSERDA's Board of Directors, NYSERDA will continue to leverage RGGI funding in concert with ratepayer funding to expand access to programs Statewide and compound the impact of ratepayer funding through expanded programming support, among other activities supporting State policies.

With respect to the LMI Portfolio, the current RGGI Operating Plan continues to support the implementation of programming Statewide where Commission authorized funding cannot be used, to ensure that consumers on Long Island and in municipal utility service territories and consumers who do not use utility services for all energy needs have access to similar clean energy and energy efficiency opportunities that are available in investor-owned utility service territories. For example, in the 1-4 residential homes sector, RGGI funds will continue to support natural gas and delivered fuel-efficiency measures in households served by municipal electric utilities and some households in LIPA territory not covered by other funding sources. In the multifamily sector, RGGI funds will be leveraged in the Affordable New Construction program offerings described in Section 0 to reduce on-site oil, non-firm natural gas, steam, and propane energy consumption across residential buildings. Across the residential sector, RGGI funds will support efficient appliance purchases for LMI households through the Appliance Upgrade Program. A full overview and details of the current RGGI Operating Plan can be found on NYSERDA's website.[23]

1.7. Stakeholder Engagement and Feedback

The LMI Order reiterated and affirmed the importance of stakeholder engagement in the development and implementation of the LMI EE/BE Portfolio. As discussed below and summarized in Appendix A, the

[22] The 2026 Final RGGI Operating Plan Amendment was approved by the NYSERDA Board of Directors on January 26, 2026, and available at https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/EE/RGGI/2026-RGGI-Op-Plan-Amendment.pdf.
[23] Regional Greenhouse Gas Initiative – Funded Programs, RGGI-Funded Programs Status Report, available here: https://www.nyserda.ny.gov/About/Funding/Regional-Greenhouse-Gas-Initiative/Regional-Greenhouse-Gas-Initiative-Funded-Programs

Program Administrators engaged with stakeholders in the design and development of the LMI EE/BE Implementation Plan.

On a moving forward basis, the Program Administrators will continue to engage stakeholders throughout program and initiative implementation, including when making significant program changes. Opportunities will include, but are not limited to, quarterly DPS Staff-led stakeholder meetings, Hubs meetings and Community Based Organizations (CBO) webinars. The Program Administrators will work with DPS Staff and stakeholders to maintain and expand the opportunities to engage with and inform stakeholders. Future opportunities for stakeholder engagement will continue to be filed publicly and distributed through emailed announcements and social media. Additionally, the Program Administrators expect additional direction in the forthcoming Staff Guidance, as detailed in the guidance discussed in the LMI Performance Management.[24] Stakeholder engagement will continue to be a fundamental component of the LMI EE/BE Portfolio.

The Program Administrators received robust stakeholder feedback as part of the program planning process. Stakeholders, such as contractors, CBOs and customer advocates have provided feedback on the LMI Portfolio. A full description of feedback can be found in Appendix A. Stakeholder feedback and input was used, and will continue to be used, to inform the development of the programs.

1.8. Disadvantaged Communities

This LMI EE/BE Portfolio Implementation Plan contributes to achieving key goals from the Climate Leadership and Community Protection Act[25] (Climate Act), including the requirement that Disadvantaged Communities (DACs)[26] receive no less than 40 percent (with a goal of 45 percent) of the overall benefits of spending on clean energy programs. The LMI Portfolio seeks to achieve this by focusing on the equity issues that can be most directly addressed by income-based clean energy programs, such as energy affordability, reduced fossil fuel combustion to advance environmental justice, and enhanced community engagement.

In the Order Directing Proposals, the Commission directed Program Administrators to ensure that benefits to DACs result not only from their LMI EE/BE portfolios, but also from their Non-LMI EE/BE portfolios. The Program Administrators have planned herein towards achieving the goal of 45 percent overall benefits of spending occurring in geographic DACs, in parallel with continued programmatic support for low-income households located outside of DACs. Progress will be measured by tracking place-based investments by census tract in accordance with DPS reporting requirements.

The LMI portfolio of program offerings will target outreach in counties with a larger percentage of DACs that also have older buildings, and where tenants were found to have higher energy burdens (percent of

[24] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio,* The Low to Moderate Income Energy Efficiency and Building Electrification Performance Management Framework (September 12, 2025).
[25] Chapter 106 of the Laws of 2019. The Climate Act is available at https://legislation.nysenate.gov/pdf/bills/2019/S6599
[26] 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."

the household's income dedicated to energy bills). This prioritization will help ensure DAC communities with the greatest needs receive the benefits of the program offerings. Program teams will collaborate with the Hubs to facilitate outreach in the communities identified through this analysis to promote and provide clarity on available programs.

Table 5. Counties with highest percentage of DACs, energy burden and older housing stock

County	Percent Energy Burden[27]	Percent DAC of Total Census Tracts[28]	Percent of pre-1960s houses in DACs[29]
Allegany	5.14	54	55
Cattaraugus	4.58	62	53
Chenango	4.68	50	56
Fulton	4.75	53	67
Montgomery	4.64	69	72
Orleans	4.56	55	62
Oswego	4.54	53	50
St. Lawrence	5.50	43	54

NYSERDA will leverage the DAC Consultant Pool to form a Residential LMI and DAC Advisory Group (RLDAG). This group will be composed of community-based organizations serving disadvantaged communities, including those that represent or serve LMI residents, to inform NYSERDA-administered LMI program design and implementation. DAC stakeholder input and feedback will be essential to developing effective program strategies that address barriers and opportunities in disadvantaged communities and LMI housing. The RLDAG will convene on a regular basis and may be organized into subgroups to meet program needs, dependent upon stakeholder expertise and interest. Its composition will be developed to ensure diverse DAC community stakeholder views, experience, expertise, and geographic location needed to inform the programs. Its scope of work and meeting frequency will be based on program needs, timelines, and budgets. The RLDAG will provide insights on program design strategies and elements to improve outcomes for DACs and LMI households. NYSERDA will continue to engage and share insights with DPS from RLDAG input sessions, and topics from DPS LMI and DAC stakeholder forums will be factored into RLDAG sessions. NYSERDA will also coordinate with utilities and invite them to participate in RLDAG meetings where appropriate and when addressing topics relevant to programs they administer.

[27] Low-Income Energy Affordability Data (LEAD) Tool, available at: https://www.energy.gov/scep/low-income-energy-affordability-data-lead-tool, November 2024; and National Renewable Energy Laboratory. State and Local Planning for Energy Tool, available at: https://slope.nrel.gov, October and December 2024.
[28] Disadvantaged Communities interactive tool, available at: https://www.nyserda.ny.gov/ny/Disadvantaged-Communities.
[29] US Census American Community Survey. "NYS, DP04 Selected Housing Characteristics: Occupancy Characteristics, Owner/Renter Characteristics, 2023, Units and Stories in Structure, HVAC, Year Structure Built, Physical Characteristics." Accessed 16 September 2024. https://data.census.gov.

1.9. Administrative Model

In the Order Directing Proposals the Commission established NYSERDA's role in administering the LMI Portfolio as the single statewide program administrator in the areas of: (1) workforce development; (2) 1-4 unit residential; (3) technical assistance; (4) direct injection programs; (5) affordable new construction; and (6) general consumer awareness and education. Similarly, the Commission determined that the Downstate Utilities will continue to administer a regional end-use incentive program for the existing affordable multifamily building market segment in the Downstate Utility service territories and NYSERDA will be the administrator the end-use incentive programs for the Upstate existing affordable multifamily market segment.

Consistent with both the Order Directing Proposals and the LMI Order, this LMI EE/BE Portfolio Implementation Plan articulates the budget allocations, program activities, and associated outcomes of the roles designated to NYSERDA and the Downstate Utilities by the Commission as Sub-Portfolios: One-to-Four Family, Multifamily, and General Awareness and Education. NYSERDA's implementation of the General Awareness and Education Sub-Portfolio will include both LMI and Non-LMI budgets as allocated in the LMI and Non-LMI Orders.

As directed by the Commission in the LMI Order, the Workforce Development role assigned to NYSERDA was detailed in a separate EE/BE Workforce Development Implementation Plan, inclusive of LMI and Non-LMI budget allocations.[30]

For more detail on program implementation models, program activities, and associated outcomes please see sections below.

Table 6. NYSERDA Planned Portfolio- Level Resource Full Time Equivalents (FTE) by Year

NYSERDA Planned FTE	2026	2027	2028	2029	2030	2031	2032	2033	2034
Full-Time Equivalents	45	69	78	82	84	58	39	0	0

Table 7. Downstate Utility Planned Portfolio- Level Resource FTE by Year

Utility Planned FTE	2026	2027	2028	2029	2030
Con Edison - Electric	6	5	6	6	7
Con Edison - Gas	18	19	19	19	19
KEDLI	1	1	1	1	1
KEDNY	4	4	4	4	4
Utility Total FTE	**29**	**29**	**30**	**30**	**31**

[30] Case 25-M-0248 *In the Matter of the 2026-2030 Non Low-to Moderate-Income Energy Efficiency and Building Electrification Portfolio* and Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio,* Energy Efficiency and Building Electrification Workforce Development Implementation Plan (filed November 2, 2026).

1.10. Portfolio-Wide Collaborations

1.10.1. LMI Customer Referral Plan

The LMI Customer Referral Plan[31] outlines how NYSERDA and the Utilities[32] will conduct customer outreach, assess and refine the referral process to, and encourage participation in, the EmPower+ program. The LMI Customer Referral Plan summarizes current efforts as well as strategies to improve: the overall referral process through electronic outreach; overall rate at which utility referrals result in EmPower+ applications; and specific customer prioritization methodologies by each utility. The LMI Customer Referral Plan will further codify implementation budgets by Program Administrator and reporting requirements. The document is intended to be iterative to thereby assess and address ongoing barriers, challenges, and opportunities.

1.10.2. Downstate and Upstate Multifamily

NYSERDA and the Downstate Utilities will work collaboratively to eliminate redundancy and confusion in multifamily program delivery through coordination in the administration of programs, enhanced transparency, and with the development of a common platform and project database (as discussed in Section 3.1.1). Further, the Program Administrators will work collaboratively to maximize the impact of ratepayer funds by increasing the funding allocated to support projects, prioritize investments in strategic measures, and ensure that DACs are positioned to participate in and benefit from the clean energy transition through participation in affordable multifamily program offerings.

1.10.3. NYSERDA, LIPA, and National Grid on Long Island

NYSERDA is coordinating with the Long Island Power Authority (LIPA), and Public Service Enterprise Group – Long Island (PSEG-LI) to determine future funding and program administration for LMI projects on Long Island to ensure residents receive efficiency and electrification work Statewide with incentive levels that are consistent with the rest of the downstate region. This will include aligning incentives, measures, and contractors across programs as well as standardizing paperwork and data sharing. LIPA and NYSERDA are currently working on establishing future funding levels for LIPA customers so the combined funding they receive from both NYSERDA and LIPA is at a level equal to the funding received by other utility customers in the area.

National Grid Long Island ended its Low-Income Energy Efficiency HEAT program on December 31, 2025, and National Grid Long Island gas customers will be eligible for EmPower+. NYSERDA is working with National Grid to transition contractors previously working with National Grid to the Empower+ program as well as a customer outreach program to encourage participation in the EmPower+ program.

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[31] Case 25-M-0249, *Pursuant to New York Public Service Commission Order Authorizing Low- To Moderate-Income Energy Efficiency and Building Electrification Portfolio For 2026-2030*, Customer Referral Plan (filed September 3, 2026).

[32] National Fuel Gas Distribution Corporation; Central Hudson Gas & Electric Corporation; Consolidated Edison Company of New York, Inc.; New York State Electric & Gas Corporation, KeySpan Gas East Corporation d/b/a National Grid, The Brooklyn Union Gas Company d/b/a National Grid NY, Niagara Mohawk Power Corporation d/b/a National Grid (collectively National Grid); Orange and Rockland Utilities, Inc.; and Rochester Gas and Electric Corporation

National Grid is working with PSEG-LI to learn about their new offering for Affordable Multifamily housing on Long Island and see where the companies can collaborate between National Grid's Affordable Multifamily Energy Efficiency Program and PSEG-LI's new participation in HCR's program.

1.10.4. Regional Residential Weatherization Programs and EmPower+

The Commission issued the Order Authorizing Regional Residential Weatherization Programs on August 14, 2026, approving with modifications, the Regional Residential Weatherization Program proposals set forth by New York State's major investor-owned utilities for the Upstate and Downstate regions.[33]

Coordination among the EmPower+ program serving LMI customers and the upcoming utility-administered regional residential weatherization programs launching in 2027 to serve market rate homeowners will be necessary to ensure all parties can meet the inter-connected objectives and rules set forth in the LMI and Non-LMI Orders collectively, and to simplify participation, reduce administrative burdens on the contractors, and reduce confusion in the market. These programs are likely to rely on a shared contractor base to install weatherization improvements in both LMI and non-LMI homes. As noted by the utilities in both the Upstate and Downstate regional residential weatherization implementation plans most recently filed in November 2026,[34] it will also be necessary for the Program Administrators to coordinate closely when setting incentive levels for both EmPower+ and the regional residential weatherization programs to make incentives available to market rate homeowners that do not exceed those that are available to low- or moderate-income homeowners.

1.10.5. Solar

As directed by the LMI Order, NYSERDA will align its LMI EE/BE programs with the NY-Sun programs serving LMI households, affordable housing, and disadvantaged communities. NYSERDA's NY-Sun program offers additional NY-Sun incentives for LMI homeowners and affordable multifamily housing projects, as well as no-cost community solar for low-income households through the Statewide Solar for All program.[35] NYSERDA's 1-4 family and multifamily LMI EE/BE programs will promote applicable NY-Sun programs to eligible projects.

1.11. DPS Performance Management Framework

On September 12, 2025, the Department of Public Service filed the Low- to Moderate-Income Energy Efficiency and Building Electrification Performance Management Framework, for measuring the overall performance of the 2026-2030 LMI Portfolio and individual programs, with respect to the advancement of the Commission's policy objectives.[36] As directed in the LMI Order, the framework provides Program Administrators, DPS Staff, and stakeholders with visibility into the development of key program metrics

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[33] Case 25-M-0248, *In the Matter of the 2026-2030 Non- Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Order Authorizing Regional Residential Weatherization Programs (issued August 14, 2026).

[34] Case 25-M-0248- *In the Matter of the 2026-2030 Non- Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*; Downstate New York Regional Residential Weatherization Program Implementation Plan and Upstate Residential Weatherization Implementation Plan (file November 2, 2026)

[35] NY Sun programs, available at www.ny-sun.ny.gov

[36] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio* The Low to Moderate Income Energy Efficiency and Building Electrification Performance Management Framework (September 12, 2025).

and outcomes, and will enhance stakeholder engagement on ratepayer-funded LMI EE/BE programs. DPS Staff will implement the performance management process outlined in the framework to track LMI EE/BE programs and ensure alignment of the overall portfolio with the Commission's policy objectives discussed in Section 1.2.2. Performance management plans developed for the LMI Portfolio will draw a clear connection between:

- Portfolio objectives and intervention strategies;
- Metrics to monitor progress and performance across the portfolio, clarifying how they are tailored to the unique needs of each sub-portfolio and providing a dictionary that makes metrics easily relatable for all stakeholders;
- Tools and processes in place to actively manage the portfolio and adapting it to the results achieved over time;
- The strategy for clearly communicating results to all stakeholders including annual performance review engagements with DPS Staff;
- Mechanisms in place for gathering feedback and incorporating adjustments to plans where warranted.

Performance management plans will be finalized with guidance from DPS Staff.

1.12. Evaluation, Measurement and Verification

As indicated in Staff's December 22, 2025, compliance letter for the LMI EE/BE Implementation Plan as well as Staff's September 12, 2025 LMI EE/BE Performance Management Framework, LMI Program Administrators will await further guidance from Staff on EM&V for the LMI EE/BE portfolio before advancing new EM&V processes and EM&V studies.[37]

1.12.1. TRM Engagement

To the degree practicable, all LMI programs will rely on the energy savings estimates and Effective Useful Life (EUL) in the Technical Resource Manual (TRM). Further, information emanating from these programs such as operations, behavior, and other similar observations can be incorporated into the TRM to further bolster energy estimates presented in the manual. NYSERDA and the utilities will coordinate to incorporate program learnings to further streamline the process for customers, inform future TRM updates, and to assess the effectiveness of the LMI programs.

SECTION TWO: ONE-TO-FOUR RESIDENTIAL SUB-PORTFOLIO

2.1. Descriptions, Context and Key Objectives

NYSERDA will support LMI households in 1-4 unit residential buildings through the EmPower+ program, aiming to help low-to-moderate income families make their homes more energy efficient and reduce energy consumption and cost for households. NYSERDA will prioritize weatherization and energy

[37] In its September 12, 2025, *Low-to-Moderate Income Energy Efficiency and Building Electrification Performance Management Framework*, DPS Staff established an initial deadline of December 19, 2025, for PAs to "develop an internal control process to facilitate performance management of the LMI programs." In alignment with the PSC's EE/BE objectives, NYSERDA's LMI Performance Management Plan submitted December 19, 2025, provides details on NYSERDA's measurement of progress and performance (through its Common Metrics Framework); portfolio management strategy; plans to communicate progress; and plans for stakeholder engagement and input.

efficiency measures with secondary goals of electrification, addressing pre-weatherization health and safety barriers to energy efficiency work as funds allow, to deliver services that maximize the impacts of ratepayer funds and maintain affordability to as many homeowners as possible.

Table 8. 1-4 Family Program Budgets, Savings, and Participants Forecast*

1-4 Family Residential	2026	2027	2028	2029	2030	2031	Total
Program Budget Plan ($ 000s)	**64,820**	**87,867**	**88,347**	**88,347**	**88,347**	**27,772**	**445,500**
EmPowerPlus	**64,820**	**87,867**	**88,347**	**88,347**	**88,347**	**27,772**	**445,500**
Low Income	58,338	77,784	77,784	77,784	77,784	19,446	388,922
Moderate Income	6,482	8,643	8,643	8,643	8,643	2,161	43,213
Utility Referral	0	1,440	1,920	1,920	1,920	6,165	13,365
Lifetime MMBtu-e Energy Savings (000s)	**5,814**	**4,979**	**4,979**	**4,979**	**4,979**	**1,245**	**26,975**
EmPowerPlus	**5,814**	**4,979**	**4,979**	**4,979**	**4,979**	**1,245**	**26,975**
Low Income	4,950	4,157	4,157	4,157	4,157	1,039	22,619
Moderate Income	864	822	822	822	822	205	4,356
Utility Referral	0	0	0	0	0	0	0
Participants (Dwelling Units)	**6,907**	**9,204**	**9,204**	**9,204**	**9,204**	**2,300**	**46,023**
EmPowerPlus	**6,907**	**9,204**	**9,204**	**9,204**	**9,204**	**2,300**	**46,023**
Low Income	5,788	7,712	7,712	7,712	7,712	1,928	38,564
Moderate Income	1,119	1,492	1,492	1,492	1,492	372	7,459
Utility Referral	0	0	0	0	0	0	0

*NYSERDA's metrics forecasts are based on historical project costs. Forecasts in this table are based on ratepayer funds allocated through the EE/BE LMI Order and are not inclusive of other leveraged funding sources, which are described in Section 2.2.8. In the EE/BE LMI Order, the Commission directed NYSERDA to make available up to three percent of its EmPower+ and upstate multifamily program budgets, a maximum of $22.9 million, available to the Utilities for referral and coordination activities.

Additional detail on budgets and benefits plans, including budget categories, non-program cost considerations, and annual and lifetime energy savings breakdowns can be found in Appendix C.

2.2. Program Offering: EmPower+

2.2.1. Program Description

The EmPower+ program provides support to low- and moderate-income New Yorkers in 1-4 unit residential buildings to subsidize energy efficiency beneficial electrification upgrades, such as insulation, air sealing and heat pump equipment for heating and hot water.

A participating contractor, chosen by the customer or assigned by NYSERDA, performs an energy assessment on the home to determine what improvements the home needs and what incentives they are eligible for based on program guidelines. The contractor then works with the customer to determine a proposed scope of work for the home. After approval of the scope of work reviewed by NYSERDA's implementation contractor, the participating contractor installs the approved measures and completes post-installation diagnostic tests to verify results and ensure it meets program guidelines. Additionally, the home may receive a third-party Quality Assurance assessment to verify program standards were met.

2.2.2. Eligibility Criteria

EmPower+ incorporated the updated definition of *low* and *moderate* income from the LMI Order, into the program eligibility criteria beginning March 18, 2026. The new definition of low-income as 60 percent AMI or 60 percent SMI, whichever is higher, will increase the number of households eligible for low-income incentives. Moderate income will continue to be defined as 80 percent AMI or SMI, whichever is higher.

2.2.3. Program Design

Since the December 2018 Commission *Order Adopting Accelerated Energy Efficiency Targets*,[38] NYSERDA has focused its LMI programming to ensure that weatherization measures like insulation and air sealing reduce heating-related energy consumption and enable homes to convert to all electric systems with reasonable utility costs. In the 2026-2030 period, NYSERDA will further simplify the enrollment process to the EmPower+ program, beyond the implementation strategies and resources developed and tested under the CEF (e.g., streamlined application and project approval systems and processes, measure packages, and using a standardized simulation for calculating energy savings) to meet the Commission's objective to reduce energy consumption and cost, and maximize the impacts of ratepayer funds.

Customers can apply to the EmPower+ program through the Joint Customer Platform[39] or through a mail-in application. Income verification for program-eligibility is completed by NYSERDA with support from an implementation contractor, and the customer is then handed off to a participating contractor to complete a no-cost energy assessment.

The participating contractor proposes a work scope to NYSERDA by submitting the project specifications and proposed scope of work through the New York Home Energy Portal (NYHEP). NYHEP allows contractors to submit work scopes, photos, and required documents to the program while applying the applicable TRM calculations to estimate energy savings for the project. Upon review and approval of the project work scope, the participating contractor installs the approved measures, performs appropriate tests to verify the measures were properly installed, and submits the final paperwork through the portal. Finally, the implementation contractor reviews the project file with the final paperwork for program compliance and submits an invoice to NYSERDA for payment of the project incentive to the participating contractor.

2.2.4. Incentive Structure

The incentives for the EmPower+ program are intended to enable low-income and moderate-income households to receive comprehensive efficiency improvements to their homes at little or no cost. For low-income customers, the program will cover 100 percent of the project costs up to a maximum incentive amount. Certain measures, such as Heat Pump Water Heaters and Air Source Heat Pumps, may not be fully covered depending on program budget. For moderate income customers, the program will cover up to 50 percent of the project cost up to a maximum incentive amount.

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[38] Case 18-M-0084 - *In the Matter of a Comprehensive Energy Efficiency Initiative*, Order Adopting Accelerated Energy Efficiency Targets (issued December 13, 2018)

[39] www.myenergy.ny.gov is the current platform serving Single Family Residential and the Appliance Upgrade Program

The incentive structure for the EmPower+ program provides incentive levels based on the location of the project (Upstate vs. Downstate), household income (low-income or moderate-income), and the number of units in the building. Incentive levels for EmPower+ are set using factors including:

- Review and quantification of market and program data on cost increases over the past 5-year period.
- Review and quantification of market and program data on regional (Upstate vs Downstate) project costs.
- Using updated cost data to model weatherization work scopes for a typical home.
- Overall program budget.

Using these factors, NYSERDA has, in consultation with DPS, determined updated incentive levels for the EmPower+ program in 2026. The factors described above and the program incentive levels will be reviewed by NYSERDA on an annual basis and, in consultation with DPS Staff, may adjust incentive levels if warranted. New incentive levels will be announced 45 days before they go into effect and apply only to projects with unsubmitted work scopes. Current incentive levels will always be posted on NYSERDA's EmPower+ webpage and in the EmPower+ Program Manual.

NYSERDA will continue to work with LIPA to ensure that the combined incentives for EmPower+ and any LIPA low-income program are equitable with incentives other customers in the region receive.

2.2.5. Measure Eligibility

The following table provides the eligible energy efficiency measures for the EmPower+ program. Specifications and requirements for the installation of measures can be found in the program manual.[40]

[40] The EmPower+ Program Manual will be posted to NYSERDA's website https://hpwescontractorsupport.com/program-manuals/

Table 9. List of Eligible Measures for EmPower+

Measure Category	Measures Included
Insulation	The following areas are eligible for insulation- attic, walls, rim joist, overhangs, basement walls, attic access, mobile home belly, ducts. Windows and Doors in limited circumstances.
Air Sealing	General whole house air sealing directed at reducing stack effect and thermal loads and maintaining the integrity of insulation measures. In some applications, insulation and air sealing are accomplished with the same measure.
Water Heaters	Heat pump water heaters/ Electric Resistance Water Heaters/Mobile home Storage tank*
HVAC	Heat pumps designed for cold climates to be prioritized. Fossil Fuel system replacements for emergency no-heat situations only. Pellet Stoves, distribution improvements, duct sealing,
Lighting	Eligibility for lighting replacements through the EmPower+ program limited to applications with the highest likelihood to realize meaningful and cost-effective energy savings. Light bulbs will no longer be offered after January 1, 2027.
Direct Install**	Pipe Insulation, Weatherstripping, LEDs (until January 1, 2027), Smoke and CO Detectors, Furnace Filter, Low Flow Showerhead, Programable Thermostat limited to applications with the highest likelihood to realize meaningful and cost-effective energy savings.
Appliances	Dehumidifier, Air Purifier, limited to applications with the highest likelihood to realize meaningful and cost-effective energy savings and when necessary for health and safety.

* Electric resistance water heaters may be considered when the installation of a Heat Pump Water Heater is unsuitable due to size constraints or to address a health & safety concern determined on a case-by-case basis.
**This list represents the measures available through the EmPower+ program and will be assessed for future modifications.

EmPower+ will continue to require the decommissioning of existing heating systems when installing a new heat pump system. Secondary systems, such as wood stoves that are used in emergency situations or for localized heating, may remain in service, in particular where there are areas of the home that cannot reasonably be served by a heat pump.

2.2.5.1. Direct Install Measures

In 2026, EmPower+ program will continue to provide a direct install offer to renters in 1-4 unit residential buildings that do not have landlord permission to receive whole-building upgrades. A new offer for renters is anticipated to be launched in Q2 2028. The new offer for occupants of rental units will leverage virtual energy assessments, combined with energy education, and the opportunity to make low or no-cost online purchases of energy efficient products from a curated catalogue of products renters can use without altering the building. NYSERDA continues to accept input from stakeholders and consult with DPS on this pilot program for renters.

2.2.5.2. Fossil Fuel Combustion Appliances

Emergency heating system replacements will be available annually during the heating season of October 1 through April 15, for projects participating in the EmPower+ program. Customers seeking this assistance will be required to provide documentation that they have been denied by a first resort public assistance offering, from programs such as the Office of Temporary Disability Assistance's (OTDA) Home Equipment Replace and Repair (HERR) or Temporary Assistance for Needy Families (TANF) before being considered for this benefit through EmPower+. As federal funding levels for OTDA programs supporting emergency equipment replacement remain uncertain, NYSERDA will continue to work with OTDA to assist homeowners and contractors in navigating the application process to ensure currently available OTDA resources are prioritized and disapproved before applying to EmPower+. Financial assistance for replacement of fossil fuel heating systems will continue to be available through the EmPower+ program as budgets allow. Specific guidelines describing how to qualify for this benefit along with available funding will be updated annually in the EmPower+ Program Manual. For budget certainty, EmPower+ will establish an annual program level budget cap prior to the heating season for spending on no-heat emergency fossil fuel heating systems. The remaining budget for emergency no-heat projects will be displayed on the NYSERDA contractor support website.

2.2.6. Pre-Weatherization Health and Safety

The LMI Order provides an allowable program-level spending cap of up to 10 percent of LMI EE/BE program budgets to be used for the remediation of health and safety and structural barriers that would otherwise prevent a project from moving forward. These funds are available only to LMI households that have applied to an EE/BE program and were deferred or would be deferred due to the presence of health and safety or structural deficiencies. The EmPower+ team will build off the experience gained from NYSERDA's Healthy Homes Value Based Payment Pilot[41] to make a select group of measures available to serve homes that have been or otherwise would be deferred from the EmPower+ program. Once a project has been deferred due to a pre-weatherization barrier, the program will schedule an inspection by a participating contractor who is authorized to install the enhanced health and safety measures. The contractor will develop a complete scope of work for the project to submit to the program inclusive of pre-weatherization, health and safety, energy efficiency and electrification work. Incentives will be available to address health and safety measures that enable the installation of energy efficiency and building electrification work, estimated to be deployed in Q1 2027. NYSERDA will set measure-level and project-level incentive caps based on market data and input from DPS Staff to right-size the incentives to be published in the EmPower+ Program Manual.

NYSERDA will track and report the number of reported deferrals, and the reasons for those deferrals, including the health and safety barriers encountered. Additionally, NYSERDA will report on the number,

[41] In partnership with the NYS Department of Health, in 2021, NYSERDA offered the New York State Healthy Homes Value-Based Payment Pilot Program, available here: https://portal.nyserda.ny.gov/servlet/servlet.FileDownload?file=00Pt000000ZnkDVEAZ. The Pilot interventions utilize an approach to residential healthy homes interventions that can improve health, reduce energy bills, improve the comfort and safety of buildings, and may result in healthcare cost savings for New York State.

nature and cost of health and safety measures completed through the program. These reports will be shared with DPS and other Health and Safety program administrators including HCR and National Grid.

Table 10 provides a preliminary list of pre-weatherization barrier measures to be included in the enhanced incentive model. It is expected that it may be necessary to limit the eligible scope of some measures to stay within program budgets.

Table 10. Pre-Weatherization Health and Safety Eligible Measures

Kitchen Exhaust Fan	Dehumidifier (Central or Room)
HRV or ERV	Knob and Tube Wiring
Window Repair or replacement (in limited applications)	Mold Assessment/ Remediation (limited scope)
Plumbing Repairs	Pest Removal (limited scope)
Vapor Barriers	Basement Moisture Mitigation
Gutter/Downspout repair	Roof Repair (limited scope)
Structural Repair (limited scope)	Moving of belongings, removal of stored items

2.2.7. Electrification

The LMI Order speaks to the challenges of electrifying space heating with heat pump solutions within the LMI market segment and states the Commission's position that the LMI market segment is not currently ready to adopt heat pump solutions at scale.[42] However, there is also recognition that there may be opportunities to advance a strategic electrification framework within this market segment; therefore the LMI Order allows up to 15 percent of program funding to be used to support adoption of heat pumps guided by the principles outlined in Section 1.2.2.

NYSERDA's EmPower+ electrification offer will adhere to principles outlined in the LMI Order by:

- Requiring that homes are weatherized to NYSERDA's "heat pump ready" specification prior to receiving heat pump incentives through the program.
- Allow for projects to proceed for specific pilots that can guarantee no risk of increased energy burden.
- Focusing on energy affordability by targeting heat pump installations in homes using delivered fuels and electric resistance heating, as those projects have shown robust savings from the installation of heat pumps in evaluated studies, and 85 percent of past participants who received heat pumps reported lower heating bills.[43]
- Working with other state agencies and billing assistance programs to determine what situations make heat pumps a viable affordable electrification option for customers who heat with natural gas.
- Connecting customers with solar and energy storage options (funded by non-EE/BE sources) where applicable.

[42] Case 25-M-0249, *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Order Authorizing Low-to Moderate- Income Energy Efficiency and Building Electrification Portfolio for 2026-2030 (issued May 15, 2025), pages 76-85.

[43] NYSERDA survey completed in January 2025, was sent to all past EmPower+ participants who had received a heat pump. Out of 109 respondents, 8 out of 10 reported being satisfied or extremely satisfied with their heat pump and 80 percent reported observing cost savings on their heating bills.

NYSERDA is coordinating with DPS on the Energy Affordability Guarantee Pilot which provides utility bill assistance to customers whose homes are fully electrified through the EmPower+ program, regardless of prior heating fuel type, to ensure their utility cost is below 6 percent of household income. The pilot focuses on single-family homes statewide and the data collected will be used to inform future decisions on paths for LMI electrification.

NYSERDA has been providing heat pump incentives for LMI homeowners using IRA HEAR funding since July 2024 and will continue to prioritize HEAR funding for insulation, air sealing, and ventilation until the funds are exhausted, expected by 2030. EmPower+ will also use Sustainable Future Program funding, while available, to provide incentives for upgrades to heat pumps, heat pump water heaters, electrical service, panel boxes, and electrical wiring when it is required for the electrification of homes as long as funding remains available.

As access to solar electricity through on-site rooftop or community solar options can decrease electric costs, eligible EmPower+ customers are automatically enrolled, at no cost, in community solar through the Statewide Solar for All program. LMI homeowners will also be encouraged to install rooftop solar and/or energy storage where feasible using the Affordable Solar Residential Incentive and Inclusive Storage Incentive programs. NYSERDA will also engage LMI homeowners with existing rooftop solar installations to evaluate the suitability of their homes for heat pump adoption.

2.2.8. Financing and Leveraged Funds

EmPower+ will continue to utilize a variety of funding sources based on availability, including ratepayer funds, RGGI,[44] OTDA HEAP, Governor Hochul's Sustainable Future Program[45] announced in 2025, and federal IRA HEAR. Of significance during the EE/BE funding period, the current RGGI Operating Plan identifies approximately $240 million for EmPower+ for FY27, FY28, and FY29 combined; and $250 million was appropriated for EmPower+ from the Sustainable Futures Program in the state's FY26 and FY27 budgets.

These funding sources each have different requirements associated with their use, and the program will leverage them with the goal of serving as many LMI homes and achieving the deepest energy savings as possible. NYSERDA will keep DPS Staff and Stakeholders informed on developments that may affect the utilization of federal funds or other sources and will update future filings of this Implementation Plan as applicable.

NYSERDA currently offers multiple financing options for LMI homeowners. The Green Jobs Green New York loan fund is available for eligible projects.[46] These loans provide concessionary interest rates and low credit score thresholds that increase access to energy efficiency projects for low-income customers. In December 2025, NYSERDA launched the Department of Energy (DOE) Energy Efficiency Revolving Loan Fund which will make available approximately $4 million for loans to low- to moderate-income, single-family homes for energy efficiency projects that comply with federal requirements including an

[44] Regional Greenhouse Gas Initiative – RGGI Meeting and Planning Documents, available here: https://www.nyserda.ny.gov/About/Funding/Regional-Greenhouse-Gas-Initiative/Useful-Documents
[45] Governor Hochul's Sustainable Future Program, as enacted in the FY2026 and FY2027 Budgets.
[46] https://www.nyserda.ny.gov/All-Programs/Residential-Financing-Programs

energy assessment. This funding augments other Green Jobs – Green New York (GJGNY) funding and leads to further access to loans for LMI homes.

2.2.9. Stakeholder Engagement

Continued stakeholder engagement is critical to the design, implementation, and ongoing improvement of NYSERDA programs. Throughout the 2026-2030 program period, the EmPower+ program will provide many structured opportunities for engagement, including monthly meetings addressing stakeholder led questions with the Hubs and the Building Performance Contractors Association (BPCA), as well as larger meetings open to the full contractor and Hub network during the monthly NYSERDA hosted webinar. As discussed in the General Awareness, and Education Section 4, below, Program staff will also attend regular Hubs leadership and "all staff" meetings.

EmPower+ program staff participate in Energy Equity Collaborative meetings including participation on the Housing, Building Efficiency, and Electrification working group. EmPower+ will also leverage the RLDAG to inform program design and implementation. This group will be composed of community-based organizations serving disadvantaged communities, including those that represent or serve LMI residents, to inform program design and implementation. DAC stakeholder input and feedback will be essential to developing effective program strategies that address barriers and opportunities in disadvantaged communities and LMI housing. The RLDAG will convene on a regular basis and may be organized into subgroups to meet program needs depending on stakeholder expertise and interest. Its composition of members will be developed to ensure diverse DAC stakeholder views, experience, expertise, and geographic location are represented to inform the program design strategies and improve outcomes. The RLDAG's scope of work and meeting frequency will be based on program needs, timelines, and budgets.

The NYSERDA Program team also hosts the Residential Market Advisory Group (RMAG) which holds quarterly meetings, including one annual in person meeting, on pertinent topics with diverse industry participants across the entirety of the residential market including manufacturers, distributers, contractors, and community groups. NYSERDA provides facilitation services through the RMAG for stakeholder-driven, ad hoc work groups to explore potential solutions to various market challenges identified by the participants.

In addition, NYSERDA sponsors a bi-annual statewide Clean Energy for Homes conference which provides a multi-day experience for stakeholders to learn, share, network and engage with Program staff. The program team has received a great deal of useful feedback, information, guidance, and direction through these channels and will continue to use these robust stakeholder avenues for future program outreach.

2.2.10. Program Outreach and Marketing

The LMI Order prioritizes customers who are participating in Utility Energy Assistance Programs (EAP) for service through the EmPower+ program. The Customer Referral Plan, as discussed below, is the framework for how the utilities will encourage EAP recipients to submit applications for EmPower+.

NYSERDA will continue to provide statewide marketing support in the form of general awareness and education on energy efficiency and clean energy opportunities for homeowners. This includes continued support for the consumer education elements of the MyEnergy platform, continued support for the Heat

Pump Planner, as well as multi-media general awareness with a call to action to drive consumers to connect with contractors and programs. These activities are described in more detail in Section 4. NYSERDA's Statewide marketing campaigns focus on messages related to the top- and mid-level sales funnel (i.e., awareness, consideration, and creating intent) while program level marketing is used to target customer segments using focused messages driving engagement at the mid- and lower-level of the sales funnel (i.e. intent and conversion.)

EmPower+ will target program outreach and qualified application processing to prioritize services for the following customer groups: LMI utility customers with high energy usage, utility customers on energy assistance programs (as identified by utilities through the Customer Referral Plan), homeowners receiving HEAP benefits (referred by OTDA), energy burdened homeowners with all heating fuel types, customers located in geographic DACs, and those who reside in areas of the State that have been historically underserved by the program. Specifications regarding prioritized application processing will be provided in the EmPower+ Program Manual and will be updated from time to time with consultation with DPS and stakeholders as market dynamics and policy priorities evolve.

NYSERDA will monitor the pipeline of project applications received to maintain stability within the available budgets across all funding sources. When the application rate exceeds budget forecasts, applications will be temporarily deferred. Deferments will be communicated to the customer and the assigned contractor who will also be notified when the application is released from the deferred stage.

NYSERDA will work with the Hubs, Utilities, and contractors to focus outreach efforts in geographic DACs. Forms of outreach may include activities such as in-person events cosponsored by Hubs and Utilities, targeted advertising by contractors, targeted mailings or social media. A variety of approaches with some regional variation will be needed to reach homeowners, renters and building owners to participate in EmPower+.

In addition, NYSERDA will collaborate with DPS Staff, utilities, and stakeholders to explore the variety of energy insecure households (for example, LMI homes that maintain low energy bills by operating in unsafe conditions) that can be used for future prioritization of customers entering the program to ensure that vulnerable households are not left behind.

The EmPower+ team will continue close coordination with the Hubs to ensure that the Hubs outreach is impactful, focused in areas with the greatest need, and readily informed by current program availability. NYSERDA believes that the Hubs are the best venue for this focused localized outreach, especially when they work in concert with utilities, as discussed in the LMI Customer Referral Plan.

2.2.11. Customer Referral Plan

On August 22, 2025, NYSERDA and the Utilities filed an initial *LMI Customer Referral Plan*[47] (CRP). On September 3, 2026, NYSERDA and the Utilities filed a revised CRP.[48] On October 5, 2026 DPS Staff

[47] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Customer Referral Plan (filed on August 22, 2025)
[48] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, 2027 Customer Referral Plan (filed on September 3, 2026).

approved the CRP.[49] The CRP outlines how the Utilities refer customers to NYSERDA with prioritized leads identified by each Utility. While electronic communication will be a core outreach strategy, each utility will use a variety of engagement opportunities ensuring that customers are aware of the advantages of and to encourage participation in EmPower+. The CRP further outlines current efforts, highlights barriers and challenges, referral prioritization methodologies, and codifies expectations of the Program Administrators. NYSERDA and the Utilities will continue to coordinate, among other things, how the Utilities may access up to three percent of program budgets to implement outreach strategies with DPS approval, including those identified through NYSERDA-led process evaluations of the EmPower+ program.

2.2.12. Regional Participation Assessment

As directed in the Order, NYSERDA has conducted an assessment of the geographic distribution of projects completed in the EmPower+ program from 2019 through 2025,[50] using regional segmentation by the Regional Economic Development Councils (REDC) and utility service areas. The tables below provide a preliminary breakout of those results with full results and analysis to be published in a forthcoming report, which will be available on NYSERDA's website and filed publicly.

Table 11. NYSERDA LMI 1-4 Program Participation (Number of Projects Completed by Region)*

REDC Region	2020	2021	2022	2023	2024	2025	Total
Western New York	2,232	2,910	2,675	3,887	4,683	2,479	**18,856**
Finger Lakes	3,229	4,706	3,253	4,642	6,689	4,008	**26,530**
New York City	1,037	1,670	2,164	2,578	5,137	2,633	**15,255**
Central New York	1,312	1,852	1,614	2,139	2,503	1,421	**10,841**
Southern Tier	1,082	1,405	1,174	1,637	2,138	1,170	**8,606**
Mohawk Valley	1,164	2,362	1,684	2,153	3,083	1,510	**11,956**
Mid-Hudson	901	1,153	2,272	2,936	2,993	1,671	**11,926**
North Country	526	556	386	774	894	457	**3,593**
Capital Region	651	683	715	1,601	1,619	785	**6,054**
Long Island	210	455	286	326	340	523	**2,140**
Total	**12,344**	**17,752**	**16,223**	**22,673**	**30,079**	**16,657**	**115,728**

*Table 11 represents all projects completed, inclusive of all funding sources, completed through June, 2025.

[49] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Customer Referral Plan Compliance Letter (filed October 5, 2026).
[50] This analysis includes projects served under the Assisted Home Performance and EmPower NY. Beginning in 2022, EmPower+ was launched to serve low income and moderate income under one program.

Table 12. NYSERDA LMI 1-4 Program Participation (Number of Projects Completed by Utility Service Areas)

Electric Utility Territory	2020	2021	2022	2023	2024	2025	Total
Central Hudson Gas & Electr	228	259	206	477	697	387	2,254
Consolidated Edison	1,089	1,752	2,225	2,691	5,128	2,542	15,427
Municipal Electric	155	217	280	649	827	440	2,568
National Grid	4,071	4,829	5,285	8,537	10,309	5,228	38,259
NYS Electric & Gas	1,935	2,290	2,356	3,835	4,707	2,459	17,582
Orange & Rockland	499	580	1,876	2,185	1,850	968	7,958
PSEG Long Island	184	418	274	319	321	482	1,998
Rochester Gas & Electric	1,553	1,802	2,009	3,689	4,960	2,963	16,976
Natural Gas Utility Territory							
National Fuel Gas	1,520	1,678	1,965	3,310	3,936	2,137	14,546
National Grid (KEDLI)	34	105	127	121	165	177	729
National Grid (KEDNY)	764	1,130	1,774	1,917	3,827	1,850	11,262
Total	12,032	15,060	18,377	27,730	36,727	19,633	129,559
Note: Customers who are served by a different electric & gas utility are included on both tables							

To directly address any issue of disproportionate program participation as determined by this analysis in the 2026-2030 period, NYSERDA will introduce a system for application review that aligns with the marketing and outreach strategy described earlier in Section 2.2.10. which will prioritize applications based on utility referrals, participation in an EAP program, geographic DAC, and location in a traditionally under-served region. Further, NYSERDA will work directly with local stakeholders, community groups, Hubs, and the utilities to study region-specific barriers to entry, and develop pilot strategies to overcome them.

2.2.13. Program Administrative Model

NYSERDA manages the EmPower+ program through the use of implementation contractors. Implementation contractors manage application intake, income verification, work scope review and approval, review of completed project documentation, and submittal of incentive invoices to NYSERDA for payment. Contractors seeking assistance with the program can contact contractor support by phone at 1-800-284-9069 or chat, meetings and emails through https://hpwescontractorsupport.com/. Customers seeking assistance can call 1-877-697-6287.

NYSERDA's Quality and Market Standards (QMS) team employs a contractor to perform quality assurance inspections on a sample of completed projects using industry best practices for quality management systems. The quality assurance inspections are the basis of NYSERDA's Quality Home Contractor (QHC) designation under the NYS Quality Energy Contractor Designation program. NYSERDA also coordinates with PSEG-LI and LIPA in areas where LMI program service territories overlap on Long Island.

Additional details on contractor requirements for administration and project implementation can be found in the EmPower+ Program Manual, including contact information for implementation and quality assurance contractors.

2.2.14. Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026	Stakeholder Engagement	Ongoing stakeholder engagement including meetings with Hubs, BPCA, monthly program update meetings, Residential LMI and DAC Advisory Group and Residential Market Advisory Group.
Q1 2027	Program Updates	• Deploy pre-weatherization Health and Safety funding • Regional Market Engagement Survey- how EmPower+ has served different regions of the state and what barriers some regions face. File on DMM.

SECTION THREE: MULTIFAMILY RESIDENTIAL SUB-PORTFOLIO

3.1. Description, Context and Key Objectives

Through the multifamily Residential sub-portfolio, the Program Administrators will design and deliver a complementary suite of energy efficiency and building electrification programs for both regulated and/or subsidized affordable multifamily housing, as well as naturally occurring affordable multifamily housing (NOAH). The Program Administrators' goals include increasing and simplifying access to clean energy solutions across New York State, maximizing the impact of ratepayer funds, and improving coordination between the Upstate and Downstate New York regions (Regions).

The Program Administrators will accomplish these goals by connecting customers to end-use incentives that offset costs associated with the installation of energy efficiency and building electrification measures and related technical assistance resources, as well as federal subsidies and catered financial products. Program offerings include Technical Assistance (TA), the Downstate Affordable Multifamily Energy Efficiency Program, the Affordable Multifamily Program Upstate, Housing Agency Assistance (Direct Injection) and Affordable New Construction.

As a Sub-Portfolio within the statewide portfolio of LMI programs and initiatives, the Program Administrators are dedicated to convening regularly to facilitate, where feasible, the coordination of program administration between the Regions as well as across utility service territories. Coordination and focus areas include, but are not limited to, measure eligibility, end-use incentive design and structure, and TA. The Program Administrators' approach to program design and administrative coordination is informed and influenced by discernible differences in building stock composition and market characteristics between the Regions. Distinctions between Regions are the result of various factors including but not limited to building and equipment age, number of stories and overall square footage, population density, and labor costs.

The remainder of this Multifamily Residential Sub-Portfolio section includes details on each program, as well as initiatives shared among the Program Administrations, including Common Multifamily Platform and Project Database (Section 3.1.1) and Pre-Weatherization Health & Safety (Section 3.1.2). Program-specific sub-sections include details regarding program design, incentive structure, measure eligibility, stakeholder engagement, and implementation milestones, among other topics.

Table 13. NYSERDA Multifamily Residential Budgets, Participants and Savings Plan*

NYSERDA Multifamily Residential	2026	2027	2028	2029	2030	2031	2032	Total
Program Budget Plan ($ 000s)	**30,418**	**32,561**	**49,970**	**61,198**	**96,419**	**23,683**	**21,951**	**316,200**
Housing Agency Partnerships (Direct Injection)	28,937	21,869	29,119	27,869	24,619	611	579	133,600
Affordable Multifamily Program Upstate (AMP Up)	3	4,826	12,083	19,984	43,502	17,658	18,343	116,400
Technical Assistance	1,479	4,533	6,700	9,148	19,898	5,414	3,029	50,200
Affordable New Construction	0	1,334	2,069	4,197	8,400	0	0	16,000
Lifetime MMBtu-e Energy Savings (000s)	**450**	**3,697**	**5,606**	**7,601**	**15,250**	**8,703**	**3,856**	**45,163**
Housing Agency Partnerships (Direct Injection)	0	603	1,300	1,533	2,206	2,085	637	8,365
Affordable Multifamily Program Upstate (AMP Up)	0	301	808	1,364	2,693	1,485	1,253	7,904
Technical Assistance	450	2,793	3,497	4,247	8,069	2,670	1,692	23,418
Affordable New Construction	0	0	0	456	2,282	2,463	274	5,476
Participants (Dwelling Units)	**4,018**	**30,338**	**41,199**	**46,453**	**70,591**	**37,272**	**20,297**	**250,168**
Housing Agency Partnerships (Direct Injection)	0	625	1,348	1,589	2,286	2,161	661	8,670
Affordable Multifamily Program Upstate (AMP Up)	0	912	2,448	4,134	8,159	4,499	3,797	23,949
Technical Assistance	4,018	27,401	33,028	39,005	60,146	30,612	15,839	210,049
Affordable New Construction	0	1,400	4,375	1,725	0	0	0	7,500
Participants (Buildings)	**47**	**653**	**890**	**1,107**	**2,103**	**847**	**469**	**6,116**
Housing Agency Partnerships (Direct Injection)	0	13	27	31	46	44	13	174
Affordable Multifamily Program Upstate (AMP Up)	0	70	188	318	627	346	292	1,841
Technical Assistance	47	562	650	746	1,430	457	164	4,056
Affordable New Construction	0	8	25	12	0	0	0	45

*NYSERDA's metrics forecasts are based on historic project costs.

Additional details on budgets and benefits plans, including budget categories, non-program cost considerations, and annual and lifetime energy savings breakdowns can be found in Appendix C.

Table 14. Downstate Utility Multifamily Residential Budgets, Participants and Savings Plan

Utility Multifamily Residential	2026	2027	2028	2029	2030	Grand Total
AMEEP Program Budget Plan ($)	**$ 66,964,352**	**$ 103,394,074**	**$ 108,458,743**	**$ 118,194,540**	**$ 130,254,807**	**$ 527,266,516**
Con Edison	$ 53,042,994	$ 78,378,597	$ 86,967,202	$ 96,356,087	$ 107,860,278	$ 422,605,159
KEDLI	$ 1,189,482	$ 3,989,518	$ 4,170,860	$ 4,352,201	$ 4,505,417	$ 18,207,477
KEDNY	$ 12,731,877	$ 21,025,959	$ 17,320,681	$ 17,486,252	$ 17,889,112	$ 86,453,880
AMEEP Lifetime MMBTu-e Savings	**$ 14,688,691**	**$ 13,787,275**	**$ 13,774,584**	**$ 14,434,128**	**$ 15,198,606**	**$ 71,883,284**
Con Edison	12,789,641	11,301,371	11,986,754	12,615,656	13,333,329	62,026,751
KEDLI	68,271	331,243	287,870	301,812	315,777	1,304,973
KEDNY	1,830,780	2,154,660	1,499,960	1,516,660	1,549,500	8,551,560
AMEEP Sum of Participants (Dwelling Units)	**140,649**	**145,651**	**150,942**	**161,137**	**173,687**	**772,066**
Con Edison	126,177	123,691	133,302	143,257	155,327	681,754
KEDLI	168	1,380	1,440	1,440	1,500	5,928
KEDNY	14,304	20,580	16,200	16,440	16,860	84,384
AMEEP Sum of Participants (Projects/buildings)	**2,221**	**1,952**	**2,003**	**2,135**	**2,297**	**10,607**
Con Edison	1,618	1,586	1,709	1,837	1,991	8,740
KEDLI	7	23	24	24	25	103
KEDNY	596	343	270	274	281	1,764

3.1.1. Common Platform and Project Database

Purpose and Regulatory Context

Consistent with the August 2026 Compliance Letter,[51] and the LMI EE/BE Order, this updated LMI Implementation Plan for 2027 provides status updates on the implementation schedule and budget considerations ~~f~~or how the Program Administrators will continue "to collaborate on the development of a common multifamily platform and project database." This section details scoping activities at the time of filing this LMI Implementation Plan and describes the status of planned project scope and implementation milestones for activities to operationalize the common multifamily platform and project database (Multifamily Platform and Database).

The Program Administrators structured this effort to ensure prudent use of available ratepayer funds by sequencing investment decisions and leveraging current project information management systems and/or planned upgrades to these systems. As described below, design and implementation activities are contingent on specific use cases and user needs defined and validated during Operational Discovery and Requirements Development phases.

Initial Alignment

Since issuance of the LMI Order, the Program Administrators have undertaken a phased approach to design and operationalize the Multifamily Platform and Database alongside, but separate from, similar such efforts previously or actively undertaken by respective Program Administrators. The key outcome from Program Administrator coordination meetings in November 2025, April 2026, and ongoing working group meetings, is a shared understanding that information exchange between the AMEEP Administrators and NYSERDA, as opposed to customer intake, is the primary gap in achieving coordinated and efficient administration of downstate affordable multifamily programs.

Therefore, the primary objective of the Multifamily Platform and Database is to enable improved and efficient information sharing among Program Administrators to support a more seamless experience for affordable multifamily participants interfacing with both NYSERDA-led TA and AMEEP.

The Program Administrators' emphasis on TA-to-AMEEP lead origination and project tracking reflects that the AMEEP Administrators benefit from timely access to information on NYSERDA-led TA activities—including study completion status and key findings—to inform potential participation in AMEEP. Access to this information can support targeted outreach by the AMEEP Administrators to facilitate clear and continuous progression from TA to EE/BE project implementation.

Similarly, NYSERDA-led TA offerings benefit from timely access to information on downstate affordable multifamily buildings that express interest in receiving these services. As such, the AMEEP Administrators will develop and implement a process to better identify and refer customers to NYSERDA for participation in available TA offerings.

Consistent with these objectives, the Program Administrators will improve the collection and bi-directional exchange of information about affordable multifamily buildings that participate—or may

[51] *Case 25-M-0249 in the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio.* LMI EE-BE Implementation Plan Compliance Letter (filed on August 11, 2026)

participate—in both NYSERDA-led TA offerings and AMEEP. Consistent with the LMI Order, this improved information exchange informs how the Program Administrators define the scope of a Multifamily Platform and Database to best serve identified market needs.

To manage both timeline and budget considerations, the Program Administrators will leverage available budget and existing information management systems. The phased implementation approach includes Operational Discovery and Requirements Development activities to define Business and Technical needs alongside parallel improvements to bi-directional lead intake and project tracking coordination.

Operational Discovery and Requirements Development

During the Operational Discovery phase in 2026, the Program Administrators identified and documented the project-level systems, data structures, and operational processes that support NYSERD-led TA and AMEEP implementation.

Findings from this effort narrowed the feasibility, sequencing, and scope of the subsequent phases to focus on developing the Business and Technical Requirements necessary for implementation. The Operational Discovery phase also included an assessment of what project-level information may be collected, and the specific conditions under which such information may be shared and used for defined business purposes.

The Program Administrators will document the Business and Technical Requirements in a Scope of Work by the end of 2026 consistent with direction from the August Compliance Letter indicating that "specific budget considerations are still being developed and are expected to be available in the fourth quarter of 2026." This effort will include a revised implementation timeline with cost considerations that will be detailed in future LMI Implementation Plans, if applicable. The Program Administrators will seek to leverage existing budget resources and, as such, will explore using implementation funding (i.e., expenditures not allocated for incentives) from the Program Administrators' Multifamily Residential Sub-Portfolios to implement this effort.

Parallel Lead Intake and Project Tracking Process Improvements

Based on the Operational Discovery and Requirements Development activities conducted throughout 2026, the Program Administrators identified targeted opportunities to improve existing program lead intake and project tracking processes. The Program Administrators reviewed interest intake pathways, including the MyEnergy Learning Center and the AMEEP interest form hosted on NYSERDA's website, to identify opportunities for operational improvement, such as incorporating AMEEP lead intake[52] and programmatic resources for affordable multifamily customers and stakeholders into the MyEnergy Learning Center. By Q4 2026, the AMEEP Administrators will have also developed a process leveraging an existing shared customer and project intake and back-end project management system to identify and send TA leads to NYSERDA when AMEEP customers express interest in a comprehensive building study or other TA offerings.

To this end, the Program Administrators will develop targeted process improvements to streamline the experience for customers and enable clearer hand-offs as projects transition across programs. These

[52] AMEEP Lead Intake Form, https://nyserda.jotform.com/team/operations/MultifamilyContractorCustomerRef

improvements will be incorporated, as applicable, into the Business and Technical Requirements described above, which will be used to update the Scope of Work.

In sum, by the end of 2026, the Program Administrators will have initiated a preliminary bi-directional lead-intake and project tracking process wherein NYSERDA and the AMEEP Administrators will intake, share, and track project information via a secure file sharing procedure. In Q1 2027, NYSERDA will be prepared to leverage its existing TA database infrastructure to provide the AMEEP Administrators with TA project details and statuses in real-time. The Program Administrators will administer this effort in coordination with the larger NYSERDA and Utility EE/BE TA Working Group.

Stakeholder Engagement

As a subsequent step, the Program Administrators will engage, as appropriate, with key stakeholders, including but not limited to HCR and NYC Housing Preservation and Development. Throughout implementation, the Program Administrators will coordinate with DPS Staff to provide status updates aligned with completion of each phase. This coordination will include opportunities for DPS Staff to provide feedback, which the Program Administrators will consider as the Business and Technical Requirements and Scope of Work are finalized prior to implementation.

Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026	Scope Definition	Finalize the Scope of Work, including an implementation schedule, phased implementation approach, and preliminary budget considerations, as applicable
Q1 2027	Stakeholder Engagement	Participate in stakeholder roundtables with housing agencies and other organizations as applicable to discuss alignment of program requirements and prospective data elements
Q1 2027	Program Updates	Identify and document next steps related to implementation
Q2 2027	Multifamily Platform and Database Launch	Initial launch of multifamily platform and database consistent with the Scopes of Work
Q4 2027	Multifamily Platform and Database Performance Assessment	Assess potential enhancements to processes and procedures and share findings with DPS Staff.

3.1.2. Pre-Weatherization Health & Safety

In the LMI Order, the Commission recognized pre-weatherization health and safety conditions (H&S Conditions or Conditions) as potential barriers to participation in EE/BE programs. The Commission authorized Program Administrators to spend up to 10 percent of LMI EE/BE program budgets on

remediations for customers who apply to LMI EE/BE programs and are deferred from receiving program services due to H&S Conditions. The Program Administrators define "deferral" for purposes of this Plan to mean circumstances that impede or prevent implementation of an affordable multifamily EE/BE project or measure-specific installation.

The Commission cautioned that ratepayer funds should not subsidize non-energy home improvements "without ample process and information, or compelling justification."[53] The Commission therefore directed the Program Administrators to track and report EE/BE project deferrals, including the reasons for those deferrals, the specific H&S Conditions encountered, and the number, nature, and cost of any activities or measures completed to remedy or resolve those Conditions. Together, these directives establish both the limited authority for affordable multifamily EE/BE programs to address qualifying H&S Conditions and, critically, the evidentiary discipline needed before Program Administrators should consider program design changes to do so.

Consistent with this direction, the Program Administrators dedicated the 2026 program year to developing a foundational understanding of H&S Conditions within New York State's affordable multifamily building stock. As an initial step, the Program Administrators examined the prevalence of these Conditions, the circumstances under which they arise, and the extent to which they may defer EE/BE project or measure-specific implementation, if known. This work helps establish the initial information and data foundation necessary to evaluate H&S Conditions on a go forward basis.

With support from a third-party vendor, the Program Administrators conducted a statewide assessment of H&S Conditions in affordable multifamily buildings (H&S Assessment). The H&S Assessment incorporates both quantitative and qualitative analysis with an overarching goal to support development of an evidence-based framework to define, characterize, and evaluate H&S Conditions that may defer EE/BE project or measure-specific implementation in affordable multifamily buildings.

Sources that substantially contributed to this work include AMEEP pre-inspection reports, NYSERDA Integrated Physical Needs Assessments (IPNA) reports, the NYSERDA Statewide Multifamily Building Study,[54] HPD's Online Code Violation database,[55] ACEEE's Weatherization Readiness Funding Analysis,[56] and the National Laboratory of the Rockies's Standard Work Specifications.[57] Qualitative research included 13 interviews with AMEEP and NYSERDA participating contractors operating across New York State to provide additional context on how contractors identify, document, and address H&S Conditions in pre-implementation building assessments and/or during EE/BE project or measure-specific implementation.

The H&S Assessment yielded three principal takeaways:

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[53] Case 25-M-0249 *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Order Authorizing Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio for 2026-2030 (filed on May 15, 2025)
[54] *NYSERDA*. Statewide Multifamily Building Study, https://www.nyserda.ny.gov/About/Publications/Evaluation-Reports/Building-Stock-and-Potential-Studies/Statewide-Multifamily-Building-Study
[55] *NYC Housing Preservation and Development*. HPD Online. https://hpdonline.nyc.gov/hpdonline/
[56] *Farrell, Dan, Jasmine Mah, Reuven Sussman, and Mike Specian*. Estimating the Impacts of Weatherization Readiness Funding. ACEEE. June 2025. https://www.aceee.org/sites/default/files/pdfs/b2504.pdf
[57] *National Laboratory of the Rockies*. Standard Work Specifications. https://sws.nlr.gov

1. H&S Conditions may affect affordable multifamily EE/BE participation and implementation by contributing to project deferrals, changes in project scope, or installation constraints.
2. Existing program processes do not consistently capture standardized, project- or measure-level information sufficiently enough to quantify the frequency, causes, costs, resolution steps, or outcomes associated with those Conditions.
3. Additional data collection is necessary to connect specific Conditions to EE/BE program implementation impacts and to support any future consideration of whether, when, and how end-use incentives should be applied to remedy or resolve any such Conditions.

These takeaways frame the H&S Assessment's preliminary findings regarding the prevalence of H&S Conditions within affordable multifamily buildings. There are several Conditions that may be present in affordable multifamily buildings—including mold, lead paint, asbestos, ventilation deficiencies, pests, means of egress issues, structural damage, and unsafe electrical systems. These H&S Conditions appear more likely to be present in buildings with construction materials predating 1979, around the time when national restrictions on the use of asbestos and lead-based paint went into effect.

The findings further underscore the need for additional and standardized data collection to determine the extent to which Conditions are identified in affordable multifamily buildings and under what circumstances they defer EE/BE project or measure-specific implementation.

For example, preliminary findings suggest that the presence of a Condition, alone, does not sufficiently indicate the effect on EE/BE project or measure-specific implementation. Other variables—including condition type, scope, location, resolution process, and worker-safety considerations—may be as or more influential in contributing to project deferrals. These preliminary observations reinforce the need for a more holistic data collection effort to support deliberate and prudent program design decisions.

The H&S Assessment therefore produced several key outputs to support future program evaluation:

- Common taxonomy to classify H&S Conditions
- Framework to evaluate the relationship between Conditions and EE/BE measures
- Identification of the data elements necessary to support future analysis and reporting
- Documentation of limitations in the information available through current EE/BE program processes

In sum, while the H&S Assessment represents a necessary first step in evaluating the need for and feasibility of addressing H&S Conditions within affordable multifamily buildings participating in EE/BE programs, it does not, on its own, provide a sufficient basis for future program design decisions. Those decisions include, but are not limited to, whether and how to apply end-use incentives to remedy or resolve identifiable H&S conditions that impede or prevent EE/BE project or measure-specific implementation.

In 2027, the Program Administrators will build on this work by advancing data collection practices to capture, on a forward-looking basis, information related to H&S Conditions, project deferrals and their causes, resolution activities, and associated costs.

Over time, this data will inform consideration of potential program design changes, including the possible deployment of end-use incentives to remedy or resolve specific conditions where the record supports such action. The Program Administrators will evaluate any such considerations in accordance with any further Commission or DPS Staff guidance.

Implementation Schedule and Milestones

Timing	Topic	Activity
Q1 2027	Data Standardization and Program Design	Interpret H&S Assessment findings to align on standardized data elements, reporting criteria, and related program design considerations.
Q2 2027	Data Collection	Begin real-time data collection using standardized criteria and the established framework.
Q3 2027	Implementation Plan Updates	Reflect, on a preliminary basis, the status of data collection activities and related early learnings in the Implementation Plan, as needed.
Q4 2027–Q1 2028	Findings Update	Integrate data collected beginning in 2027 with the initial H&S Assessment to build on preliminary findings related to deferrals, resolution activities, and associated costs.
Q2 2028	Program Design Updates	Consider whether further program design changes or updates may be appropriate based on the expanded record, findings update, and any further Commission or DPS Staff guidance.

3.2. Program Offering: Technical Assistance

3.2.1. Program Description

One of the first steps that multifamily building owners can take to optimize building performance and control energy costs is to understand how their building is operating and what can be improved. For multifamily buildings, TA services provide building owners with the information they need to understand their energy usage, help them make key decisions to retrofit and improve their building's conditions, and enable them to make informed investment decisions to save money and reduce greenhouse gas emissions.

NYSERDA's standalone LMI Technical Assistance offering is provided through the NYSERDA FlexTech program, with a focus on ensuring that TA services facilitate building owners' participation in an end-use incentive program (AMEEP) while also meeting buildings' broader needs and enabling roadmaps to improve building efficiency, reduce energy costs, and implement affordable electrification. NYSERDA's AMP Up (Affordable Multifamily Program Upstate) offers integrated technical assistance for affordable multifamily building owners upstate participating in this program.

3.2.2. Eligibility Criteria

Eligible customers include existing affordable multifamily residential buildings with five or more units. To qualify, at least 25 percent of the units must be occupied, or can be reasonably expected to be occupied, by households earning not more than 80 percent of the AMI or SMI, whichever of the two is greater. Naturally Occurring Affordable Housing as well as regulated and/or subsidized affordable multifamily buildings, can participate in technical assistance**.**

Program participants can provide proof of eligibility by submitting evidence of coverage under an active regulatory agreement with an affordable housing agency or a "rent roll" using a NYSERDA provided rent roll tool.

3.2.3. Program Design

Statewide TA

NYSERDA provides no- and low-cost technical assistance services to eligible affordable customers. NYSERDA prioritizes speed of technical assistance delivery and synchronicity with the end-use incentive offering (AMEEP), where applicable. To achieve these objectives, NYSERDA aligns program requirements with the AMEEP program requirements where applicable. AMP Up provides integrated technical assistance for customers participating in that program.

Building owners can indicate their interest in receiving technical assistance through NYSERDA's FlexTech program or through the AMEEP, or AMP Up respective program applications. Technical assistance funding is available to upstate and downstate customers.

TA for Portfolio Owners

TA is also available to Upstate portfolio owners, enabling them to receive an energy management plan for their portfolio, energy audits on selected buildings and establish peer-to-peer exchanges within cohort intakes. In the initial rollout of the service, Upstate public housing authorities were grouped into a cohort during the intake process to facilitate peer-to-peer learnings. These TA services prime portfolios to participate in end use incentive programs.

3.2.3.1. Program Services

Work is underway by Program Administrators to simplify participation and reduce administrative burden for applicants and contractors by coordinating TA with the end-use incentive programs, where applicable, to ensure that technical assistance assessments are fully aligned with AMEEP and AMP Up requirements.

TA services will include, but not be limited to, the following types of technical assistance:

- *AMEEP or AMP Up project support:* This entails supportive services for AMEEP or AMP Up projects throughout the project lifecycle. Services may include, but are not limited to, project planning, project application support, competitive bid process support, funding guidance, construction oversight, post-construction support, communication and relationship management, and project close out.
- *Energy Studies:* This includes audits through detailed building assessments. The depth of the assessment is dependent on the proposed scope of work. Studies include financial and technical analyses, pertinent data collection (including seasonal energy consumption data as applicable), building system analysis, as well as financial and technical analysis. Program requirements are aligned with end-use incentive programs, where applicable.
- *Energy Management:* Energy management support from a technical expert is a key component to implementing effective plans, to help overcome resource, training and knowledge gaps with respect to efficient operations and maintenance of existing systems and to support adoption of new clean energy technologies. Energy management staff use data-driven analyses to assess, optimize

and manage energy usage and to identify potential operational improvements and EE/BE projects. The identification of no- and low-cost energy savings opportunities is often overlooked without a dedicated resource. This human resource support helps ensure savings are realized, new opportunities are identified, and phased recommendations are implemented.

Upstate and downstate customers are eligible to receive these services.

NYSERDA maintains pools of qualified energy service providers, which building owners may leverage under the Multifamily Contractor Network. Recognizing the need for high-quality technical assistance to ensure that high-quality projects are submitted and realized, NYSERDA will continue to expand its service provider networks to provide sufficient coverage for technical assistance. NYSERDA expanded contractor eligibility to include installers, particularly air source heat pump and ground source heat pump installers in this Network.[58]

3.2.4. Incentive Structure

TA is provided at no or low cost based on an approved scope of work and budget. TA scopes of work and budgets are reviewed and approved by the project managers. The review process ensures that the technical assistance scope is suitable, useful, and right-sized for the end-user. Approved TA incentives are detailed in the NYSERDA purchase order that is issued to the applicant. Eligible costs under the TA incentives may include, but not be limited to, energy audit site visits, energy modeling, energy savings analysis, portfolio owner support, and development of the AMP Up/AMEEP application.

3.2.5. Electrification

Participants interested in evaluating an electrification measure that switches heating/hot water end-use away from fossil fuels and/or electric resistance heating will be required to ensure that affordability for tenants, as well as building owners, is maintained and that the heat pump systems are appropriately sized for the building. The principles for strategic electrification provided in the LMI Order[59] and discussed in Section 1.5.1 above, will be reflected in the NYSERDA technical assistance study requirements for electrification assessments and will be referenced in the program materials. Emphasis will be on an efficiency-first approach to ensure weatherization measures are first considered to reduce a building's heating and cooling loads before sizing heat pump systems. Utility bill impacts for the tenants as well as the building owner will also be assessed and will be accounted for in the TA recommendations. Additional technical assistance requirements for electrification projects will include completion of an energy study based on electrification best practices detailed in technical assistance program materials.

3.2.6. Financing and Leveraged Funds

As it relates to financing products, NYSERDA/NY Green Bank (NYGB), Con Edison and National Grid are focusing efforts on financing solutions for AMEEP and AMP Up. NYSERDA will continue to ensure

[58] NYSERDA's Multifamily Contractor Network (previously known as the Multifamily Residential Energy Pathways Participating Contractor Network) is a network of multifamily contractors that have been vetted by NYSERDA and available to service NYSERDA's multifamily programs. The network includes Energy Assessor and Installer service categories.

[59] In the *Order Authorizing Non- Low- to Moderate- Income Energy Efficiency and Building Electrification Portfolios* (issued May 15, 2025) page 80-83, the Commission provides four principles to guide the implementation of electrification in the LMI market segment through the 2026-2030 EE/BE portfolio.

that TA providers are made aware of available financing products, and that relevant financing offers are communicated to customers within the TA process.

3.2.7. Stakeholder Engagement

The technical assistance service for the AMEEP and AMP Up programs was developed in collaboration with the Program Administrators. Connecting TA to end-use incentives will be continuously improved through ongoing collaboration with the Program Administrators. Furthermore, to facilitate effective market feedback and integration into program design, NYSERDA continues to participate in market engagement forums alongside AMEEP and AMP Up program stakeholders. Details of stakeholder engagement activities in 2026 may be found in implementation milestones below. Substantive modifications to the TA program will be documented in an update to the Implementation Plan and communicated at least 45 days before changes take effect. In addition, changes to program incentives will be approved by Staff before the change is made.

3.2.8. Program Administrative Model

TA services are administered by NYSERDA. NYSERDA oversees technical assistance project intake, project management, transfer to end-use incentive programs, close-out and reporting.

3.2.9. Program Outreach & Marketing

The Statewide LMI TA offering benefits from promotion by the end-use incentive programs as well as NYSERDA's broader efforts to promote technical assistance through the FlexTech program. Additionally, LMI TA is promoted through program marketing and outreach channels including the Regional Clean Energy Hubs and the Multifamily Contractor Network that is eligible to participate in the TA offering. The statewide TA offerings are promoted at industry conferences.

3.2.10. Implementation Schedule and Milestones

All statewide standalone technical assistance is provided through the FlexTech program. AMP Up provides integrated technical assistance for customers participating in that program.

Timing	Topic	Activity
Q4 2026	Program Update	On annual basis, review program materials and make appropriate updates to program requirements and/or to improve clarity
Q3 2027	Stakeholder Engagement / Program Update	• Conduct outreach with stakeholders to assess updated processes and procedures. • Assess potential program enhancements.

3.3. Program Offering: Downstate Affordable Multifamily – AMEEP

3.3.1. Program Description

In 2026, AMEEP transitioned from a statewide program to a regional program covering the Downstate Utilities' service areas in New York City, Westchester County, and Long Island.[60] In 2027, AMEEP will continue to offer end-use incentives for the installation of energy-efficient electric and gas equipment and technology in existing affordable multifamily buildings with five or more units. Beginning in 2026, as discussed in Section 3.3.8, Con Edison began offering building electrification incentives in addition to gas incentives. As a natural gas utility, National Grid will continue to offer gas incentives only.

Ultimately, during the 2026-2030 funding period, the Downstate Utilities will continue to administer AMEEP such that building owners, operators, developers, and their representatives have greater access to capital in the form of end-use incentives and, to the extent possible, complementary financial products. This level of support is important for existing affordable multifamily building owners and operators in the Downstate region to install electric and gas energy efficiency upgrades, as well as building electrification retrofits.

3.3.2. Eligibility Criteria

To participate in AMEEP, applicants must have an active Con Edison account and/or active gas account in National Grid's KEDNY or KEDLI service territories. Eligible customers include existing affordable multifamily residential buildings with five or more units. To qualify, at least 25 percent of the units must be occupied, or can be reasonably expected to be occupied, by households earning not more than 80 percent of the AMI or SMI, whichever of the two is greater. Unregulated and/or unsubsidized multifamily buildings, also referred to as NOAH, as well as regulated and/or subsidized affordable multifamily buildings, can participate in AMEEP.

Program participants can provide proof of eligibility by submitting evidence of coverage under an active regulatory agreement with an affordable housing agency or a "rent roll", as in the case of a building with rent stabilized units covered under the Housing Stability and Tenant Protection Act (HSTPA).[61] Buildings not covered under either a regulatory agreement or HSTPA rent stabilization law may provide evidence of their affordability status by submitting rent roll using an AMEEP Administrator approved tool. Details regarding customer eligibility criteria and requirements are codified in the AMEEP Manual.

3.3.3. Program Design

AMEEP is designed to maximize energy savings and reduce costs to tenants and owners of existing affordable multifamily buildings by encouraging comprehensive building upgrades while maintaining the flexibility to accommodate single-measure or smaller multi-measure projects. This approach supports

[60] The AMEEP Administrators share service territory in Brooklyn, and to a lesser extent in Queens. Con Edison provides both electric and gas service in Queens, electric service in Brooklyn, with National Grid providing gas service in both boroughs. Con Edison serves Manhattan, the Bronx, and Westchester County with both electric and gas service exclusively; whereas National Grid serves Long Island with gas service exclusively. PSEG Long Island is the incumbent electric service provider contracted by the Long Island Power Authority and does not administer AMEEP.

[61] Housing Stability and Tenant Protection Act of 2019 (June 11, 2019)

existing affordable multifamily buildings with the resources necessary to reduce their energy usage and system operating costs; improve tenant comfort; and contribute to the State's climate policy objectives.

AMEEP Administrators align administrative and program requirements. These include using the same customer and participating contractor applications, program manual, technical guide(s), incentive fact sheet(s), and custom savings calculator(s). Eligible customers submit a single application; work with the same Implementation Contractor (IC) as their point of contact, and a single party performs pre- and post-measure installation inspections. This approach maintains overall cost efficiency for the customer and mitigates confusion.

Close collaboration between the AMEEP Administrators facilitates market conditions in which existing affordable multifamily customers have access to a generally aligned set of incentives and requirements regardless of their utility service provider. This approach further mitigates the potential for unnecessary confusion among customers and in the Downstate existing affordable multifamily market more broadly. As discussed in Section 3.1, the AMEEP Administrators also coordinate with NYSERDA to align incentive and program requirements as applicable between AMP Up and AMEEP, and connect interested AMEEP participants with TA, and to receive referrals of buildings that have participated in the NYSERDA-led TA program. This coordination also includes ongoing efforts to leverage and align interest intake pathways, such as the MyEnergy Learning Center and the AMEEP interest form hosted on NYSERDA's website. Accordingly, the AMEEP Administrators are committed to supporting NYSERDA with up-to-date program information to facilitate effective market outreach.

3.3.4. Incentive Structure

AMEEP offers two program pathways: a "Comprehensive Pathway," to encourage whole-building energy retrofits and a "Non-Comprehensive Pathway," to engage customers for whom measure-level upgrades may be more feasible. Incentives for Comprehensive Pathway projects are awarded on a dollar per dwelling unit basis and calculated using a "points-based" system, which allocates points to energy efficiency measures based on their energy savings potential and alignment with policy objectives such as emphasizing weatherization interventions. Comprehensive projects that develop multi-measure project scopes that reach higher point tiers qualify for increased incentive rates.

Comprehensive projects can take more than 12 months to complete installation and finalize all requirements. To reduce this potential burden on building owners and facilitate timely project completion, Con Edison will accommodate mid-project milestone payment options. Details regarding the project-specific circumstances under which a mid-project milestone payment will be codified in the AMEEP Manual.

Customers opting for the Non-Comprehensive Pathway can perform measure-level upgrades, which is helpful for buildings with limited or no cash reserves. Non-Comprehensive incentives are dependent on the measure and can be awarded on the basis of dollar per equipment, dollar per savings, or dollar per unit of measure (e.g., square footage).

Additionally, AMEEP will continue to offer incentives for secondary savings derived from delivered fuels. AMEEP participants located in targeted areas may be eligible to participate in and receive incremental incentives from Con Edison's Non-Wires Solutions (NWS) Program or Non-Pipes

Alternative (NPA) Program.[62] AMEEP customers may also receive incremental incentives by participating in National Grid's NPA offerings, if eligible.[63] AMEEP customers in National Grid's territory who receive incentives through National Grid's Gas Demand Response program may be eligible to have 50 percent of their Demand Response incentive matched by National Grid if they commit to using it for an Energy Efficiency project.[64]

Program requirements for EE/BE measure installations and details regarding incentives, including those for secondary savings and incremental NWS and/or NPA incentives from both Con Edison and National Grid will be codified in the AMEEP Program Manual and a supplemental Technical Guide.

3.3.5. Program Design Changes

The AMEEP Administrators implemented the following program design changes in 2026 notwithstanding Sections 3.3.8. Review of program design and assessment of potential design changes will continue in 2027:

Adjusted Comprehensive Pathway incentives to cover a meaningful share of the overall project costs;

- Evaluated and rebalanced Comprehensive Pathway point values to reflect the final Strategic Measure Framework and higher-cost measures;
- Introduced an additional Comprehensive Pathway tier with a lower point threshold to accommodate projects that may be interested in the Comprehensive Pathway but that may not need or have sufficient access to capital to resource a project that would otherwise be eligible for higher tiers;
- Reviewed required application documentation and tools to simplify and update installation and other technical requirements; and
- Identified and implemented best practices to reduce the occurrence of inspection flags to accelerate processing times through removal or replacement of project processes (e.g., pre- and/or post-inspection) without compromising quality assurance and quality control procedures.

3.3.6. Measure Eligibility

The AMEEP Administrators will continue to assess program design changes to both the AMEEP Comprehensive and Non-Comprehensive Pathways informed by measure eligibility determined by the Strategic Measure Framework as acknowledged in the NYS TRM. Table 15 provides a non-exhaustive list of eligible measures incentivized through AMEEP.

[62] As of the date of filing this Implementation Plan, there is an active NWS territory in Jamaica, Queens, and surrounding areas.

[63] https://www.nationalgridus.com/Business-Partners/Non-Pipeline-Alternatives/

[64] https://www.nationalgridus.com/NY-Business/Energy-Saving-Programs/Demand-Response

Table 15. AMEEP Measure Eligibility Categorization

Measure Category	Measure Example (*Not Exhaustive*)
Building Envelope	Insulation - Attic Cavity; Insulation - Wall; Insulation- Above Deck Roof; Window Replacement; Air Sealing Package
Other Gas & Electric Energy Efficiency	Energy Management System; Smart Thermostatic Radiator Enclosure; Pipe Insulation; Domestic Hot Water Controls; Refrigerators
Natural Gas Devices	Boiler and/or Boiler Burner or Furnace Replacement
Building Electrification	Air Source Heat Pump, Heat Pump Water Heater

3.3.7. Natural Gas Combustion Equipment

The LMI Order offers allowances for gas combustion equipment as neutral measures in multifamily buildings if such measures are combined with comprehensive building controls and can justify a significant efficiency gain over the minimum required standard at replacement. The LMI Order further directs that the level of funding to support incentives for new gas combustion equipment shall not exceed the proportional level they occupied in the previous funding period.

To meet the standard of "significant efficiency gain" the AMEEP Administrators will require that equipment must be at least five percent more efficient than required by code and meet criteria related to building characteristics to be eligible for incentives for new gas combustion equipment.

A building that meets all three of the following criteria would be eligible for incentives for new gas combustion equipment:

- Built before 1979;
- Uses steam for internal distribution of space heating;
- Has at least 25 apartments or 25,000 square feet of conditioned space.

Alternatively, a building may demonstrate that it has specific limitations (e.g. spatially or structurally) that prevent it from adopting full-load space heating technology. Infrastructure limitations may include:

- Inadequate electrical service capacity at the building level or the grid level for increased electric demand (e.g., space for additional transformers or switchgear) that cannot be addressed in a timely (within 18 months) manner or in a cost-effective manner such as when infrastructure cost required of the customers exceeds an excessive amount of the proposed retrofit cost net any rebates or incentives. Electrified equipment options that have extensive lead times that exceed 18 months (e.g. custom-made electric equipment).
- Operational expense challenges with electric alternatives such as when the resultant normalized first-year forecasted electric utility expense is an excessive amount higher than the prior year's combined normalized electric utility costs.

Buildings that meet the criteria as eligible for incentives for new gas combustion equipment will also be eligible for incentives that support systems that provide Phased electrification solutions even if they do not meet the full design day space heating requirements.

3.3.8. Electrification (Con Edison only)

The Commission authorized LMI Program Administrators to allocate up to 15 percent of LMI program budgets to support building electrification.[65] Electrification in the existing affordable multifamily sector, however, presents unique challenges for customers stemming from economic and institutional barriers.

For example, affordable multifamily buildings often have low-or-no cash reserves, may face limited or impeded access to alternative capital resources, and may perceive other capital needs as being more urgent. Electrifying heat and/or hot water involves both converting to a new technology and switching energy commodities which can add post installation uncertainty regarding operating economics. To minimize adverse economics, Con Edison will integrate its electrification offerings with building weatherization upgrades, among other requirements.

Con Edison's Affordable Multifamily Electrification offering (AMEEP-Electrification or AMEEP-E) pairs full load electrification incentives with AMEEP's Comprehensive and Non-Comprehensive pathways for existing affordable multifamily buildings. For AMEEP Comprehensive, Con Edison introduced an additional electrification Tier (not to be confused with the additional Comprehensive Tiers as discussed in Section 3.3.5). This new electrification Tier carries a lower point threshold whereby electrification incentives on a dollar per dwelling unit basis are assigned a point value and, at a minimum, paired with a building envelope measure identified in Section 3.3.6.

To integrate with AMEEP Non-Comprehensive, Con Edison introduced the same full load electrification measures and use the same dollar per dwelling unit incentive approach for ease of understanding. Electrification incentives for both program pathways are greater than or equal to those offered through market rate multifamily offerings.

Additionally, Con Edison's AMEEP-E offering adheres to principles outlined in the LMI Order by:

- Prioritizing weatherization and energy efficiency via a requirement that buildings are weatherized and/or have undertaken necessary energy efficiency upgrades prior to the installation of building electrification measures.
- Focusing on energy affordability by targeting conversion of delivered fuel customers and assessing energy affordability implications of building electrification installations prior to project approval (i.e., retaining the option to decline projects where energy costs can be reasonably expected to increase).
- Expecting compliance with existing housing agency regulations (e.g., no heating cost shift to tenants).
- Working with DPS and other stakeholders to align programs and policies (e.g., Energy Affordably Program, Home Energy Assistance Program, sub-metering, etc.) that may better enable affordable electrification in existing multifamily buildings while mitigating potential cost shits and/or increases to energy burden.

Con Edison will continue to work closely with stakeholders, including both customers and participating contractors (as discussed further in Section 5.3) to navigate AMEEP-E program requirements including

[65] As discussed in Section 3.3.1, as the natural gas utility, National Grid will not offer electrification incentives.

eligibility determination at the building level and based on the proposed technology. AMEEP-E includes the following requirements:[66]

- The customer must be an existing affordable multifamily building and have an active Con Edison electric account;
- The customer may not use end-use incentive funding from NYSERDA;
- The customer must comply with any/all existing State or City regulations or rules that instruct landlords/building owners and/or their operators to pay for the cost of tenant heat;
- The customer must install full-load heat pumps for heating and heat pump water heaters;
- The customer must install attic cavity insulation and/or additional weatherization measures if such measures are not already present in the building;
- The customer must decommission the existing fossil fuel heating system; and
- The customer may not use incentives for common area projects only.

3.3.8.1. Phased Electrification

As specified in the LMI Order, Phased Electrification projects that do not meet 100 percent of the building's heating load are eligible for incentives and may be treated as Strategic measures. Projects that do not electrify an entire building are treated as Phased if they meet the following conditions:

- Include new equipment that uses electricity and one or more of the following sources of heat: geothermal heat exchanger, air-source heat pump, or recovered waste heat;
- Permanently reduce fossil fuel or district steam use for space, water, or process heating; and
- Projects that may permanently reduce fuel or district steam use, together "legacy systems," either by disabling or disconnecting the heating equipment or system, or through the application of controls.

A sample list of project types that do not electrify each of a building's heating needs but which the Company considers Phased and Strategic include:

- Projects that electrify a specific area (e.g., floor, wing);
- Projects that electrify a specific system (e.g., space heating, domestic hot water (DHW) or ventilation only);
- Heat recovery systems;
- Buildings with hydronic internal distribution systems for space heating that electrify a central legacy heating plant in stages (as a result, there will likely be heat pumps working to heat the hydronic loop alongside legacy fossil equipment);
- Ground-source heat pump projects that connect separate spaces to a shared bore field in stages; and
- Projects that electrify less than 100 percent of a building's domestic hot water heating load with a central plant.

[66] The AMEEP Manual will detail specific installation and technical requirements.

Generally, buildings with hydronic distribution systems that exclusively heat their water loop with fossil or steam boilers without the addition of new heat pump equipment will not be eligible for building electrification incentives.

3.3.9. Financing and Leveraged Funds

The AMEEP Administrators will leverage NYSERDA's support to coordinate with NYGB and, as practicable, community lenders, including those that have received capital through NYGB's Community Decarbonization Fund, to investigate the feasibility of developing complementary financial products for buildings eligible to receive AMEEP incentives. Such offerings could help existing affordable multifamily buildings pursue EE/BE projects with AMEEP incentives and create new opportunities for community lenders to deploy capital in high impact use cases.

3.3.10. Stakeholder Engagement

The AMEEP Administrators view engagement with and feedback from stakeholders as being central to the design, implementation, continued refinement, and overall success of the program. AMEEP Administrators engage consistently with and seek direct feedback from public offices and agencies, Participating Contractors (PCs), and other stakeholders, including various CBOs.[67]

For example, the AMEEP Administrators host Participating Contractor and Industry Partner (PC&IP) webinars. During PC&IP webinars, AMEEP Administrators present upcoming changes to the AMEEP Manual and provide an open forum for participating contractors and other industry partners to share feedback or ask clarifying questions regarding program design, implementation features, and strategies.

Additionally, the AMEEP Administrators engage with stakeholders through surveys, in-person and/or virtual smaller focus group and/or larger group "Stakeholder Listening Sessions." As acknowledged in Appendix 5.3, in preparation for filing this LMI Implementation Plan, the AMEEP Administrators hosted a Stakeholder Listening Session regarding the AMEEP Administrators' plans to collect and analyze EE/BE project data to investigate the potential of incorporating Pre-Weatherization Health and Safety incentives into AMEEP as discussed in Section 3.3.8.

The AMEEP Administrators will continue to emphasize stakeholder engagement in 2027 by holding no fewer than two Participating Contractor and Industry Partner Webinars and at least one Stakeholder Listening Session.

3.3.10.1. Disadvantaged Communities

To build on prior success driving affordable multifamily project uptake in DACs, the AMEEP Administrators will coordinate with and leverage the expertise of the NYSERDA Regional Clean Energy Hubs and other CBOs, as appropriate and consistent with the approach taken in the companies' respective Non-LMI portfolios, to identify opportunities and refine programmatic approaches to serving customers in DACs.

[67] Public offices and agencies include but are not limited to New York City Housing Preservation and Development, the Mayor's Office of Climate and Environmental Justice, and HCR. Other stakeholders, including private CBOs, include but are not limited to Kinetic Community Consulting (Kc3), Urban Homesteading Assistance Board (UHAB), The Association for Neighborhood and Housing Development (ANHD), and the Downstate Utilities Regional Clean Energy Hubs as discussed in Section 3.3.10.

Specifically, the AMEEP Administrators will emphasize the following areas and actions:

- Use program participation data to identify priority customer segments and buildings.
- Leverage relationships outside of implementation contracts with CBOs to establish trust with hard-to-reach customers who may otherwise be hesitant to participate, generate project leads, and support early-stage project development.
- Assess areas where delivery models work well and where additional focus may help advance lead generation and project completion.
- Review program performance on an ongoing basis against targets and policy objectives to adjust offerings based on achievement and customer feedback.
- In coordination with NYSERDA and the Utilities, schedule and host an informational workshop in the first half of 2027 to bolster the Regional Clean Energy Hubs' education and awareness of the Utilities' business model. An outcome of this workshop should be a regular cadence of virtual and/or in-person meetings among the Utilities, Regional Clean Energy Hubs, and NYSERDA of virtual and/or in-person meetings to provide a forum to share information and insights about programmatic and related activities.

3.3.11. Program Administrative Model

Downstate Utilities leverage internal resources, a primary IC, and additional sub-contractors to administer Downstate non-LMI and LMI multifamily program offerings. Key functions for the Downstate Utilities to administer programs, include but are not limited to:

- Sales and outreach;
- Contractor management;
- Application processing and review;
- Building engineering reviews and inspections; and
- General program administration and backend systems management.

3.3.11.1. Program Implementation

At the time of filing this LMI EE/BE Implementation Plan, the Downstate Utilities are engaged in a coordinated process to update this holistic Downstate multifamily administrative model in light of the August 2026 Order Authorizing Regional Residential Weatherization Programs (Regional Residential Weatherization Order),[68]and are committed to identifying and implementing cost-effective strategies given the Companies' responsibility for jointly administering both the Downstate Regional Weatherization Program and AMEEP. One such strategy could include a future proposal for the AMEEP Administrators to pool resources akin to the non-LMI Downstate Regional Weatherization implementation model authorized by the Regional Residential Weatherization Order. Downstate Utilities will coordinate with DPS Staff regarding this and other proposals that are intended to increase the efficient and cost-effective administration and implementation of Downstate Utility-administered end-use incentive offerings.

[68] Case 25-M-0248 In the Matter of the 2026-2030 Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio; *Order Authorizing Regional Residential Weatherization Programs* (issued August 14, 2026)

3.3.11.2. Portfolio Flexibility

The AMEEP Administrators recognize that demand for Weatherization—and attic cavity insulation in particular—has grown robustly in the affordable multifamily market segment and, as such, may have the potential to stress available LMI funding in the outer years of the 2026-2030 portfolio period. Because neither the LMI Order nor the Non-LMI Order identified the conditions under which allocated non-LMI budget and associated savings target may be shifted to the LMI Portfolio, nor the procedural mechanism(s) to do so, the AMEEP Administrators will coordinate with DPS Staff to identify both the specific conditions under which a budget and target transfer may be appropriate, as well as the necessary regulatory actions that the Downstate Utilities must undertake to effectuate such a transfer.

3.3.12. Program Outreach and Marketing

The AMEEP Administrators coordinate to conduct outreach and marketing efforts by leveraging the capabilities of a singular IC and internal resources. As discussed in Section 3.3.10, the Downstate Utilities will explore opportunities to educate customers and generate project leads through relationships with CBOs, including the Regional Clean Energy Hubs. As discussed in Appendix 5.3, the AMEEP Administrators solicit feedback from a broad selection of stakeholders on a range of topics, including outreach and marketing.

3.3.13. Cost Recovery

The LMI Order specifies that utilities are to collect the funding to administer their EE/BE programs via a surcharge. The Downstate Utilities will recover all EE/BE program spending, up to the authorization reflected in Appendix C of the LMI Order, via a component of the SBC, effective January 1, 2026. The Downstate Utilities each submitted reports on August 13, 2025, identifying and quantifying utility-administered EE/BE program costs, including labor, that was transitioned to the SBC on January 1, 2026.

As required by the LMI Order, the Downstate Utilities' separate EE/BE surcharges will be developed by service class using "the same allocations as included in base rate recoveries" and will be implemented "in such a manner that maintains the existing NYPA customer exemptions."[69] Con Edison EE/BE program funding collected via the surcharge will be treated as a regulatory asset and amortized over a 15-year period, including carrying charges, which reflects roughly the aggregate useful life of the measures incentivized by programs that make up the electric and gas EE/BE portfolios.

In December 2025, the Downstate Utilities each filed tariff revisions[70] – developed in consultation with DPS Staff – that enable recovery of the utility-administered EE/BE programs, which were effective on January 1, 2026. Annually thereafter, the Downstate Utilities will update the surcharge on a calendar year

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[69] Case 25-M-0249, *In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio*, Order Authorizing Low-to Moderate- Income Energy Efficiency and Building Electrification Portfolio for 2026-2030 (issued May 15, 2025), pages 140-141

[70] National Grid KEDLI Tariff Compliance Filing:
https://www2.dps.ny.gov/ETS/search/searchSubmissionID.cfm?sub_id=2833613
National Grid KEDNY Tariff Compliance Filing:
https://www2.dps.ny.gov/ETS/search/searchSubmissionID.cfm?sub_id=2833609
Con Edison Tariff Compliance Filing:
https://www2.dps.ny.gov/ETS/search/searchSubmissionID.cfm?sub_id=2833711

basis and reconcile any over-or under-collections from the prior year as part of the updated surcharge statement for the upcoming year.

3.3.14. Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026	Program Update	AMEEP Program Manual and EE/BE Technical Guides – Program Manual filed on DMM and program materials posted to respective Downstate Utility websites and NYSERDA resource page
Q1 2027	Stakeholder Engagement	PC&IP Webinar – Program design updates and features
Q2 2027	Program Update	AMEEP Program Manual and Technical Guide filed on DMM and program materials posted to respective AMEEP Administrator websites and NYSERDA resource page
	Implementation Plan Update	Material program design updates reflected in Implementation Plan as applicable
Q3 2027	Stakeholder Engagement	PC&IP Webinar- Program design updates and features

3.4. Program Offering: Affordable Multifamily Program Upstate - AMP Up

3.4.1. Program Description

Supporting the Upstate affordable multifamily market to reduce energy costs, increase building performance and improve the comfort of residents requires a nimble program that meets building owners where they are, provides flexibility in project scopes, and prioritizes energy efficiency. The AMP Up Program, NYSERDA's new Upstate multifamily program, offered a nuanced approach to addressing the needs of small multifamily buildings, integrate TA and end-use incentives into one cohesive program, establish a concierge service to offer building owners services through the entire EE/BE project lifespan, and leverage existing contractor networks and CBOs to expand the outreach of the program.

NYSERDA assumed the role of program administrator for the Upstate affordable multifamily program, transitioning that role from the Upstate investor-owned utilities following the closure of AMEEP on January 1, 2026. NYSERDA launched the AMP Up website and announced an informational public webinar in Q1 2026, and released the AMP Up Program Manual in April 2026 coinciding with a launch event. Upstate NY AMEEP projects committed within 2025 may still be completed in 2026.

3.4.2. Eligibility Criteria

To participate in AMP Up, applicants must pay into the natural gas or electric SBC and be located north of Con Edison service territory. Eligible customers include existing affordable multifamily residential buildings with five or more units. To qualify for the program, at least 25 percent of the units must be occupied, or can be reasonably expected to be occupied, by households earning not more than 80 percent AMI or SMI, whichever is greater. NOAH as well as regulated and/or subsidized affordable multifamily buildings, can participate in AMP Up.

Program participants can provide proof of eligibility by submitting evidence of coverage under an active regulatory agreement with an affordable housing agency or a "rent roll" using a NYSERDA provided rent roll tool. Mixed use buildings are also eligible to participate provided that at least 50 percent of their gross heated square footage is residential space.

3.4.3. Program Design

Program support available to Upstate affordable multifamily buildings will be comparable to those offered through the Downstate AMEEP to simplify participation and reduce administrative burdens for contractors and service providers that work across regions and program offerings.

The AMP Up program will be composed of two pathways, one for low-rise multifamily buildings (5-20 unit, 1-3 story buildings) and one for larger multifamily buildings, as discussed in more detail below.

Dedicated Pathway for Small Multifamily Buildings (Low-Rise Pathway)

Small multifamily buildings represent one of the hardest-to-serve sectors of the built environment in New York State due to the aging building stock with significant deferred maintenance, lack of contractors focused on serving this market segment, a significant need for technical assistance and support throughout the project lifecycle, and the overall variance in project scopes and costs.

The Upstate multifamily building stock is dominated by small buildings, with approximately 80 percent of multifamily households living in buildings with 19 or fewer units.[71] To address these issues, NYSERDA offered the Low-Rise Pathway, targeted at small multifamily buildings of 20 units or less and between one to three stories tall. These low-rise buildings represent a significant opportunity for energy savings as approximately 75 percent of low-rise housing was built before 1980, before building energy codes were put in place.[72]

Dedicated Pathway for Larger Multifamily Buildings (Larger Buildings Pathway)

Larger multifamily buildings, over four stories and/or over 20 units, represent a smaller portion of the Upstate multifamily building stock but also represent a significant opportunity to deliver energy efficiency benefits and improve building performance and comfort for LMI New Yorkers. Relative to smaller multifamily buildings, larger multifamily buildings are more likely to have central heating systems, on-site staff, and longer project timelines. Larger multifamily buildings are also more likely to require additional technical analysis and design (e.g. calibrated energy model), particularly if they are exploring fuel-switching measures.

3.4.3.1. Program Services

A Concierge Service contractor or a NYSERDA Multifamily Participating Contractor are utilized for technical assistance and project oversight. Projects not using the services offered by the Concierge Service Contractor have the option of leveraging NYSERDA's Multifamily Contractor Network, which supports scope of work development, construction oversight and project closeout.

[71] Data pulled from 2022 5-year American Community Survey
[72] Data pulled from 2022 5-year American Community Survey

Concierge Service

NYSERDA heard from stakeholders that, to support pipeline building, AMP Up should offer services that support applications and shepherd projects through to completion. NYSERDA launched a concierge service to support projects as they submit applications and move through the program in response to stakeholder feedback.

Qualified contractor(s) provide the following concierge services to the building owner throughout the life of the project: submit a project application; provide technical assistance (described in Section 3.1.2 above), such as audits or assessments, develop the project scope of work; and provide supportive services, such as project planning, funding guidance, construction management and commissioning.

Note that not all buildings are expected to require this level of service. Owners of larger buildings and portfolio managers can offer many of these services in-house. In which case, those projects would forego the Concierge Service.

3.4.4. Measure Eligibility

NYSERDA aims to make energy conservation measure selection flexible to allow selection across measure categories instead of offering rigid measure packages. All AMP Up projects are required to complete TA (described in Section 3.1.2 above), which will be the basis for determining the selection of a project's energy conservation measures.

The AMP Up program will feature three distinct measure[73] types:

- *Prescriptive:* These measures include appliance upgrades, occupancy sensors, simple controls, pipe insulation, basic air sealing, and other simple measures that are minimally disruptive.[74] Gas appliance upgrades are not eligible measures.
- *Weatherization:* These measures include insulation for attic, wall, rim/band joist, and foundation walls, and air sealing and window replacement.
- *Electrification and deep energy retrofits:* These measures include heat pumps for heating and domestic hot water, ventilation, energy recovery systems, and building envelope improvements, such as overclad. New gas combustion equipment is excluded from the program, but controls for existing gas combustion equipment that will improve the efficiency of the equipment are permissible.

Measure eligibility is aligned with the Strategic Measure Framework. Measures defined as non-strategic are not eligible for AMP Up incentives. Below is a preliminary, but not exhaustive, list of eligible measures in AMP Up. Note, the list of eligible measures or the measure requirements may change over the course of the program, and the AMP Up Program Manual will be reviewed at least annually to

[73] All measures supported by AMP UP are "strategic" per the January 2026 Technical Resource Manual plan, except for refrigerators, low flow shower heads, low flow faucet aerators, pipe insulation, thermostatic shower restriction valves, boiler, furnace and unit heater, tune ups for boiler or furnace, smart thermostatic radiator enclosure, and thermostatic radiator valve. These measures are considered "neutral" when installed in LMI building as part of a package of measures.

[74] Per the Order Authorizing *Low-to Moderate- Income Energy Efficiency and Building Electrification Portfolio for 2026-2030* (issued May 15, 2025), refrigerators are considered neutral in LMI buildings where the installation of the refrigerator improves energy affordability for the household.

determine any needed changes to the measure details. The program will also incorporate changes made in the NYS Technical Resources Manual that impact measure eligibility and/or requirements.

Table 16. Measure Eligibility Categorization

Measure Category	Measure Example (*Not Exhaustive*)
Building Envelope	Insulation - Attic Cavity; Insulation - Wall; Window Replacement; Air Sealing Package
Other/Gas & Electric Energy Efficiency	Thermostatic Radiator Valves; Pipe Insulation; Refrigerators; Boiler/Furnace Tune Up
Building Electrification	Air Source Heat Pump; Heat Pump Water Heater; Ground Source Heat Pump

3.4.5. Incentive Structure

AMP Up offers concierge service and end-use incentives described above. Concierge services are provided at no cost to the building owner for approved scopes of work up to a cap. The end-use incentives are provided on a dollar-per-dwelling-unit basis and those incentive levels are based on the proposed measure types (prescriptive, weatherization, electrification or deep energy retrofits) in the scope of work. The incentives will be approved when the scope of work is approved. The aggregate project level incentives will be capped at 85 percent of the overall project costs for Low Rise Pathway projects and at 70 percent for Larger Buildings Pathway projects.

Comprehensive multifamily projects often span multiple years from application to project completion. To alleviate building owners or contractors carrying the burden of those total costs until the project is completed, NYSERDA offers payments associated with project milestones. Payments are issued at three project milestones: once the scope of work or proposed measures is approved, midpoint construction, and construction completion.

3.4.6. Electrification

The Commission authorized LMI Program Administrators to allocate up to 15 percent of LMI program budgets to support building electrification. As noted in the AMEEP Section 3.3.8 above, electrification in the existing affordable multifamily sector presents unique challenges for customers stemming from economic and institutional barriers. Examples include limited cash reserves and increased operating costs when switching from natural gas heating systems.

NYSERDA's AMP Up electrification offer adheres to principles outlined in the LMI Order by:

- Requiring that buildings are weatherized and/or have undertaken necessary energy efficiency upgrades prior to the installation of building electrification measures.
- Focusing on energy affordability by targeting conversion of delivered fuel customers and assessing energy affordability implications of building electrification installations prior to project approval (i.e., not approving electrification measures when the TA analysis indicates that energy costs are expected to increase).
- Expecting compliance with existing housing agency regulations (e.g., no heating cost shift to tenants) and reasonably demonstrating that operating costs will not increase post installation.

- Working with DPS, Program Administrators and other stakeholders to align programs and policies (e.g., Energy Affordability Program, Home Energy Assistance Program, sub-metering, etc.) that may better enable affordable electrification in existing multifamily buildings while mitigating potential cost shits and/or increases to energy burden.

Buildings that propose to install heat pumps will be assessed to verify that the heat pump installation will not lead to increases in the total housing costs of tenants. If a building is approved to install a heat pump system, the building owner will be asked to develop and sign-off on a plan on how they intend to keep utility costs affordable for tenants.

3.4.6.1. Phased Electrification:

Phased Electrification is a practical intervention strategy to support decarbonization of larger buildings.

As specified in the LMI Order, Phased Electrification projects that do not meet 100 percent of the building's heating load are eligible for incentives and may be considered as strategic measures under the Commission's Strategic Measure Framework. Custom projects that do not electrify an entire building will be treated as Phased if they meet the following conditions:

- Include new equipment that uses electricity and one or more of the following sources of heat: geothermal heat exchanger, air-source heat pump, or recovered waste heat;
- Permanently reduce fossil fuel use for space and water heating.

Project types that do not fully electrify the entirety of a building's heating needs but which NYSERDA considers Phased and Strategic:

- Projects that electrify a specific area (e.g., one floor of apartments, or one line of apartments);
- Projects that electrify a specific system (e.g., space heating, DHW or ventilation only);
- Heat recovery systems;
- Buildings with hydronic internal distribution systems for space heating electrify a central legacy heating plant in stages. As a result, there will likely be heat pumps working to heat the hydronic loop alongside legacy fossil equipment;
- Ground-source heat pump projects that connect separate spaces to a shared bore field in stages;
- Projects that electrify less than 100 percent of a building's domestic hot water heating load with a central plant.

3.4.7. Financing and Leveraged Funds

NYSERDA acknowledges that there is a barrier for affordable multifamily building owners to implement EE/BE projects due to limited cash reserves and the need for upfront capital at project outset to fund EE/BE upgrades. In response, NYSERDA program teams are working with NY Green Bank to explore targeted financing solutions such as incentive-bridge loans to provide access to capital needed at early stages of project development. More generally, refer to Section 3.6.5 of this document for a description of NYGB's primary funding pathway to support green affordable housing statewide, RFP 18: Financing Arrangements for High-Performance Affordable Housing.

- Additional sources of leveraged funds: The current RGGI Operating Plan, approved by NYSERDA's Board of Directors, has allocated $5 million of additional funding to support EE/BE projects in the affordable multifamily housing sector.[75]
- WAP funded projects will be encouraged to apply to AMP Up and support will be provided to simplify access to this source of federal funding, where possible
- DOE IRA Home Electrification Appliance Rebate (HEAR) program supports heat pump dryers through NYSERDA's Appliance Upgrade Program.[76]

3.4.8. Stakeholder Engagement

NYSERDA held the following topic-based working groups to obtain stakeholder feedback on the program design: financing, inter-program coordination, pipeline building, technical scope, program structure and workforce. Individual sessions were also held with specific stakeholders, such as PHAs, WAP sub-grantees, and energy service providers, to gain insight into specific key issues in the Upstate market. More details about the stakeholder activities may be found in Appendix 5.4.

In 2026, NYSERDA continued to hold quarterly webinars for its Multifamily Contractor Network in addition to roundtable discussions with stakeholders to explore health and safety options and assess the AMP Up program. Details of these engagement activities are available in the implementation milestone table.

3.4.8.1. Disadvantaged Communities Outreach

NYSERDA will leverage the DAC Consultant Pool to form a Residential LMI and DAC Advisory Group. This group will be composed of community-based organizations serving disadvantaged communities, including those that represent or serve LMI residents, to inform AMP Up program design and implementation. DAC stakeholder input and feedback will be essential to developing effective program strategies that address barriers and opportunities in disadvantaged communities and LMI housing. The RLDAG will convene on a regular basis and may be organized into subgroups to meet program needs and dependent upon stakeholder expertise and interest. Its composition of members will be developed to ensure diverse DAC community stakeholder views, experience, expertise, and geographic location are represented to inform the program design strategies and improve outcomes. The RLDAG's scope of work and meeting frequency will be based on program needs, timelines, and budgets.

3.4.9. Program Administrative Model

NYSERDA will act as the sole program administrator for AMP Up and plans to utilize an implementation contractor to manage application intake, income verification and eligibility, work scope review and approval, review of completed project documentation, and submittal of incentive invoices.

[75] The 2026 Final RGGI Operating Plan Amendment was approved by the NYSERDA Board of Directors on January 26, 2026, and available at https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/EE/RGGI/2026-RGGI-Op-Plan-Amendment.pdf.
[76] NYSERDA's Appliance Upgrade Program (AUP) can access rebates for the purchase of heat pump dryers and to complete any necessary electrical upgrades, including wiring and panel upgrades, to install the dryer in their home. Homeowners and renters are eligible to participate.

3.4.10. Program Outreach and Marketing

NYSERDA will take a segmented approach to engaging with and serving the Upstate affordable multifamily sector by initially investing in pipeline development through portfolio owners, leveraging projects participating in complementary programs, such as through WAP, where possible, and developing local partnerships and mobilizing existing networks:

- *Portfolio owners:* NYSERDA's experience through demonstration programs such as the Empire Building Challenge[77] have illustrated the utility of cohort-based approaches to EE/BE project development and peer to peer knowledge exchange. In 2026, NYSERDA developed its first cohort of portfolio owners and offered dedicated technical assistance and peer-to-peer knowledge exchange to support effective energy efficiency and building electrification planning, project development and financing, and construction support/oversight for project implementation.
- *Existing projects and WAP:*[78] AMP Up is exploring the ability to provide dedicated support for projects that are combining WAP funds with AMP UP, where possible. NYSERDA will coordinate with HCR on the eligibility criteria for projects participating in both program offerings. NYSERDA and HCR will then engage with the WAP subgrantee networks to communicate this offering and support program implementation. This component of the Upstate program will:
    - Leverage the existing WAP Upstate pipeline and associated WAP sub-grantee network that oversees WAP projects;
    - Streamline the process to leverage funds through both programs;
    - Fund deeper energy efficiency and building electrification measures; and,
    - Address the WAP waitlists.
- *Local partnerships and existing networks:* To effectively engage with and serve the Upstate affordable multifamily sector, NYSERDA intends to mobilize existing networks of contractors and CBOs. To encourage contractors to participate in the program, NYSERDA has streamlined the application process to join its Multifamily Contractor Network[79] for contractors in good standing with other NYSERDA contractor networks, such as EmPower+ and FlexTech Consultants. Other contractor networks will continue to be assessed for participation in the AMP Up program.
- *Regulated Housing:* Affordable multifamily buildings located in Upstate New York that have received financing or support from HCR's housing preservation programs are eligible to participate in the AMP Up offering, provided these buildings are not also advancing their project through the Housing Agency Partnerships (Direct Injection) program described in Section 3.5. These buildings will receive

[77] NYSERDA's Empire Building Challenge is a purposeful demonstration program launched in 2020 as part of the Clean Energy Fund. The program partnered with 27 real estate leaders who collaboratively worked together on EE/BE project design and implementation. Round 3 winners were announced in 2025 via this press release https://www.nyserda.ny.gov/About/Newsroom/2025-Announcements/2025-09-05-Governor-Hochul-Announces-Nearly-28-Million-Awarded-To-Advance-Energy-Efficiency

[78] This program provides grants to cover the cost of home weatherization for income-eligible households at or below 60 percent state median income. See, https://hcr.ny.gov/weatherization-applicants.

[79] https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/Find-a-Multifamily-Contractor; this network was formerly known as the Multifamily Residential Energy Pathways and as the Multifamily Building Solutions Network.

information about the AMP Up offering through NYS HCR and be provided concierge service for all questions related to program eligibility and application.

As discussed in Section 1.8, the AMP Up Program targets counties with a larger percentage of DACs that also have older buildings, and where tenants were found to have higher energy burdens (percent of household's income dedicated to energy bills). This prioritization helps ensure DAC communities with the greatest needs receive the benefits of the program. The program team collaborates with the Regional Clean Energy Hubs to promote outreach in these communities, such as through road show events conducted throughout Upstate in 2026 where we invite contractors and building owners and managers to an in-person event to learn about the Multifamily Contractor Network and AMP Up.

NYSERDA's Multifamily team is also collaborating closely with the Regional Clean Energy Hubs and the Disadvantaged Communities Consultant Pool to conduct outreach, identify local contractors, and support effective customer identification and acquisition.

In addition to these market engagement and outreach strategies, NYSERDA promotes the AMP Up offering through its email newsletter, website, and through strategic channel partners such as the Rural Housing Coalition and the New York State Association for Affordable Housing (NYSAFAH).

3.4.11. Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026	Program Update	On annual basis, the program manual will be reviewed for potential enhancements to streamline customer journey, clarify program requirements and update incentive structure.
	Stakeholder Engagement	• Multifamily Contractor Network Webinar – program updates, market feedback • Health and safety listening sessions
Q1 2027	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar – program updates, market feedback
Q2 2027	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar – program updates, market feedback
Q3 2027	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar – program updates, market feedback
Q4 2027	Stakeholder Engagement	• Multifamily Contractor Network Quarterly Webinar – program updates, market feedback • On annual basis, review the program materials for potential enhancements

Additional stakeholder engagement will be conducted through the Residential LMI and DAC Advisory Group.

3.5. Program Offering: Housing Agency Partnerships (Direct Injection)

3.5.1. Program Description

This program offering is a partnership between New York's housing agencies and NYSERDA. The Direct Injection program allocates LMI EE/BE funds to existing housing preservation programs administered by

HCR and HPD to accelerate the efficient electrification of affordable multifamily buildings. This allocation of ratepayer funds with existing housing agency programs reduces administrative overhead, encourages participation, and delivers a superior "user experience" to project developers in the regulated, affordable housing sector in NYS.

This offering, originally launched in 2021, served both the new construction and existing buildings market segment during the Clean Energy Fund. For 2026 to 2030, this program will only focus on serving existing buildings. The goal of the program is to provide ratepayer incentives to projects that reduce the incremental upfront cost difference between an efficient, all-electric retrofit and a business-as-usual retrofit that maintains or increases the building's reliance on fossil fuel for space heating and hot water. Eligible program scopes combine heating electrification measures with building envelope measures to ensure that the projects deliver energy savings. Additionally, projects that receive funding through these programs are also subject to a regulatory agreement which provides protections for tenants against bill increases.

NYSERDA's collaboration with the housing agencies through the Direct Injection program has resulted in sustainability practices and decarbonization being woven into the agency's practices. NYSERDA's funding has also increased the availability of decarbonization project funding and provided critical support to the housing agencies to deploy programs.

3.5.2. Eligibility Criteria

Regulated, affordable multifamily housing projects that are already participating through HCR's programs or are in HPD's preservation project pipeline are eligible for this program.

3.5.3. Program Design

The Direct Injection programs will continue to be administered under the established agency-branded programs. HCR's programs are branded the Clean Energy Initiative (CEI)[80] and HPD's programs are offered under the banner of the Resilient & Equitable Decarbonization Initiative (REDi).[81] For HCR, CEI is not a standalone program, but rather is only available to projects who are applying to existing HCR programs (see Leveraged Funds Section 3.3.9 for additional details on eligible programs). These programs are updated periodically – i.e., through the release of annual RFPs and program offerings, which are publicly announced by HCR. For HPD, REDi is similarly not a standalone program and available only to projects that are in HPD's preservation pipeline. Updates to the REDi program are also done periodically and are announced by HPD.

3.5.3.1. Program Services

Eligible projects are assigned a dedicated technical assistance provider (TAP) as part of the project team throughout the design and construction process, which can be for a period of several years, and are assigned upon project award. The TAPs work closely with the project teams, and offer services such as a Design Charette and design, bidding, and construction reviews throughout the life of the project.

[80] https://hcr.ny.gov/clean-energy-initiative
[81] https://www.nyc.gov/site/hpd/services-and-information/redi.page

3.5.4. Measure Eligibility

HCR and HPD will update their term sheets periodically, based on program insights and stakeholder feedback. The latest term sheets are posted on each agency's respective program website. These term sheets provide details on eligible project scopes.

Measure eligibility is set forth in HCR's Sustainability[82] Guidelines and HPD's Design Guidelines,[83] which are required for all projects that participate in their preservation programs. These guidelines are updated on a regular basis and are informed both by agency requirements as well as program learnings.

3.5.5. Incentive Structure

HCR and HPD develop term sheets, based on the agency guidelines, which articulate the requirements that must be met by a project to be eligible for program funding. In addition to eligibility requirements, the term sheets provide detail on the associated incentive amount and structure, by project scope and measure category. HCR and HPD update their term sheets periodically, based on program insights and stakeholder feedback. The latest term sheets are posted on each agency's respective program website.

In addition to providing project funding to support the installation of EE/BE measures, NYSERDA funding will continue to support these additional program components:

- *Technical Expertise:* NYSERDA funds third party technical assistance providers to assist Housing Agencies with program and project-level expertise. Over time, this TA has supported the development of internal expertise and now both agencies have robust teams of sustainability experts that design and execute these programs. NYSERDA will continue to provide technical assistance going forward, with the goal of phasing out ratepayer funded third-party technical assistance.
- *Trainings:* NYSERDA and its technical assistance providers have trained housing agency staff on a robust curriculum of sustainability and decarbonization topics, with the goal of bringing expertise in "green" underwriting and programing in-house.
- *Sustainability and Design Guidelines:* HCR and HPD have best-in-class guidelines to guide the decarbonization of affordable housing over time, which positions the agencies as national leaders in this space. These design guidelines set a minimum level of energy efficiency for all projects that receive support from the Housing Agencies. These guidelines are dynamic and will continue to be updated in future years to be more rigorous.
- *Data:* Prior to 2021, neither agency was tracking key metrics related to energy efficiency and building electrification. Both agencies now manage a database to track success towards reaching state/local climate goals. HCR has completed the HCR Sustainability Database that includes comprehensive project level data from CEI, and HPD has a comprehensive tool that collects critical baseline and projected performance and cost data across their decarbonization programs, as well as agency-wide project trackers. This data collection will be further developed in future years to allow for improved knowledge sharing and coordination amongst Program Administrators.

[82] https://hcr.ny.gov/sustainability-guidelines
[83] https://www.nyc.gov/site/hpd/services-and-information/preservation-design.page

- *Solar*: HCR and HPD, through NYSERDA's support, have expanded from decarbonization funding into solar. Both agencies have launched solar feasibility tools, which require a subset of development projects to assess the financial and technical feasibility of solar.

3.5.6. Financing and Leveraged Funds

This program will continue to use ratepayer funds in the project underwriting process and help developers secure third-party construction loans. This process of "embedding" ratepayer funds in the Housing Agencies' preservation programs allows for the leveraging of other sources of funding for housing modernization and affordable housing preservation. This is particularly the case for low-income housing tax credits (LIHTC) and conventional financing whereby the project developer re-mortgages the building to secure the capital needed to modernize the building(s) and provide a safe and comfortable living environment for the building's residents. Some examples of leveraged tax credits and agency financing include, but are not limited to:

- Housing Trust Fund Corporation (HTFC) / Division of Homes Community Renewal (DHCR) 9 percent LIHTC RFP
- Housing Finance Agency (HFA) 4 percent LHTC Tax-exempt Bond Financing
- HCR Subsidy Financing – including the Small Building Participation Loan Program (PLP)
- HPD financing for its multifamily preservation project pipeline

3.5.7. Stakeholder Engagement

HCR and HPD staff will continue to conduct recurring stakeholder engagement – roundtables, webinars, interviews, etc. – and regularly update their programs through the term sheets offerings. Additionally, feedback received through the construction of projects and subsequent building operations will continue to inform the recurring updates to HCR's Sustainability and HPD's Design Guidelines

For example, in response to stakeholder feedback that some aspects of HCR's initial CEI existing buildings term sheets were challenging to achieve, HCR updated them to allow for more project scope flexibility, tiered incentive amounts for space heating based on envelope improvements, and pathways for phased electrification over time.

Additionally, NYSERDA meets with both agencies on a recurring basis to ensure effective program design and implementation, including identifying opportunities to better streamline program administration. For example, over the 2023–2025 timeframe, NYSERDA updated its agreement with HPD to reduce administrative work associated with allocating ratepayer money to HPD preservation projects.

HCR and HPD plan to share stakeholder feedback as well as program learnings through a series of public case studies and playbooks, which shall be issued periodically.

3.5.8. Program Administrative Model

While the programs are co-designed by NYSERDA and the housing agencies, they are directly administered by HCR and HPD and are incorporated into the agencies' respective project development processes. In doing so, the housing agencies are supported by technical assistance contractors, which are

funded by NYSERDA. These contractors serve as dedicated “technical assistance providers” and are assigned to awarded projects.

3.5.9. Implementation Schedule and Milestones

Timing	Topic	Activity
2026	Procure new agency TAP support	Source and procure new agency technical assistance providers to support HCR and HPD for the new EE/BE program period (2026-2030)
2027	Stakeholder Engagement	HCR and HPD to host recurring roundtables, webinars, interviews, etc. to inform necessary program changes and updates. These are generally conducted on an as-needed basis and driven by planned program changes.
	Program Guidelines update	HCR to review, update, and publish new Sustainability Guidelines
	Program Guidelines update	HPD to review, update, and publish new Design Guidelines
	Program Enhancements	• HCR and HPD to periodically update their applicable Program Term Sheets, which address program requirements, eligibility, and incentive structures. These are updated generally once a year, but this may vary. • HCR to issue periodic program RFPs, which serve as the participation channel to receive NYSERDA program funds. These are released generally every year, but this may vary.

3.6. Program Offering: Affordable New Construction

3.6.1. Program Description

As the new construction industry increasingly embraces high performance, all-electric new construction, NYSERDA plays the critical role of technical assistance provider to the affordable new construction industry. To ensure high performance, energy efficient and affordable buildings, the design community, housing providers and others have emphasized two key areas of support needed from NYSERDA’s technical assistance offering: early-stage design and targeted, post-construction commissioning support.

The goal of these technical services is to work with architects, engineers and building owners to foster quality project execution – both in the initial building design and subsequent commissioning of projects – to ensure that buildings function in their optimal state and can achieve meaningful operational savings over time.

3.6.2. Program Eligibility Criteria

New construction, gut rehabilitation, and adaptive re-use projects where at least 25 percent of the units will be occupied, or can be reasonably expected to be occupied, by households earning not more than 80 percent of the AMI or SMI, whichever of the two is greater, are eligible.

For enhanced design support, participating projects will be required to fully electrify their heating, cooling, and ventilation systems without installation of fossil fuel equipment and be in the early design phase of the project development.

3.6.3. Program Design

The Affordable New Construction TA program supporting early-stage design was launched in Q3 2026 with the program name, “New Efficient Homes New York: Enhanced Design Support” (PON 6236). In Q2 2027, NYSERDA intends to launch an enhanced commissioning offer to support high-performance operation of all-electric systems. Projects that meet or exceed local and/or State code requirements are eligible to apply for technical assistance. Technical assistance services shall focus on high-performance buildings and all-electric systems.

3.6.3.1. Program Services

This program will provide services in two categories:

Enhanced Design Support

Technical assistance to support the design of high-performance, energy efficient buildings. Eligible TA includes energy and economic modeling and analysis; design and specification development; research into novel technologies and solutions; the development of cleaning, operational and maintenance manuals so that building managers and owners have comprehensive understanding of best practices for operations and maintenance of building systems; Third-party certification approvals; as well as support for an integrated design and construction project.

Enhanced System Commissioning

Cost-share funding for post-construction enhanced commissioning and optimization to ensure energy systems are operating as designed. While “commissioning” is a standard practice for the new construction industry, this service is intended to support buildings that have performed traditional commissioning and still have challenges with building operations. This could be due to time-lag between system commissioning and building lease-out, lack of climate zone specific system guidance, or due to challenges identified but not addressed in the commissioning process.

While the industry has made great progress in designing and delivering high-performance affordable housing, there are still issues that arise due to a myriad of factors. The Enhanced System Commissioning offer is intended to provide targeted support so that high-performance buildings can overcome any unexpected operational and maintenance challenges and realize the full benefits of high performance buildings – increased comfort and system longevity as well as reduced operational costs.

3.6.4. Incentive Structure

For Enhanced Design Support, incentives will be provided on a per square foot basis for eligible multifamily projects, at incentive amounts specified by market sector (low-to-mid scale multifamily and large-scale multifamily). Incentives will be capped at $250,000 per project, with a maximum of 5 projects per Applicant per year.

3.6.5. Financing and Leveraged Funds

NY Green Bank provides creative financing solutions for efficiency and electrification measures across the New York State building sector, inclusive of affordable new construction projects that align with affordability eligibility criteria required by NYSERDA’s Affordable New Construction offering. Through RFP 18: Financing Arrangements for High-Performance Affordable Housing, NYGB invites property

owners and developers, energy service companies, equipment manufacturers, capital providers, and other market participants to submit applications for financing for the construction or retrofit of multifamily affordable housing buildings to high levels of energy performance. NYGB offers a variety of financial products in the building sector such as pre-development loans, bridge loans, and construction-to-term loans, with typical loan sizes ranging from $5 - $50 million that can support a single asset or a portfolio of assets. To date, NYGB has provided over $146M of financing to green affordable housing. NYGB and the NYSERDA Affordable New Construction program are also actively collaborating to explore additional ways to drive market transformation in the built environment.

In addition to EE/BE funding for Affordable Multifamily, the New Efficient Homes New York program that was launched in Q3 2026 has RGGI funding to provide enhanced design support to a broad spectrum of residential new construction projects, inclusive of 1-4 unit residential projects as well as multifamily residential projects that do not meet the LMI eligibility criteria. NYSERDA also launched the New Efficient Homes New York: Heat Pump Incentive Program (PON 6242) with RGGI funds to provide heat pump incentives to single family and multifamily residential new construction projects, for properties less than 50,000 square feet in size. The incentive schedule is structured as a declining block and is being coordinated with utility heat pump incentive programs. Additional details about the RGGI funded components of the New Efficient Homes New York program can be found in the New York State RGGI Operating Plan.[84]

3.6.6. Stakeholder Engagement

NYSERDA will host at least semi-annual workshops with program stakeholders to adapt and evolve this program offering in alignment with new construction industry conditions, needs and priorities.

3.6.6.1. Disadvantaged Communities Outreach

NYSERDA's new construction program offerings will leverage the Residential LMI and DAC Advisory Group mentioned in the AMP Up section to communicate available offerings and receive feedback and input on how to best design and deliver these program offerings to support affordable new construction in disadvantaged communities.

3.6.7. Program Administrative Model

NYSERDA's affordable new construction program offerings will be administered by NYSERDA. NYSERDA will oversee technical assistance project intake, project management, close-out and reporting.

3.6.8. Program Outreach and Marketing

Information about NYSERDA's affordable new construction program offerings will be disseminated to architects, engineers and the developer community through the team's existing network of channel partners, such as the Passive House Accelerator and the American Institute of Architects New York ate; through homebuilder and contractor associations; through ongoing events tailored to homebuilder, developer, and designer communities of practice across New York State; as well as broadly promoted through NYSERDA email newsletters and website.

[84] The 2026 Final RGGI Operating Plan Amendment was approved by the NYSERDA Board of Directors on January 26, 2026, and is available at https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/EE/RGGI/2026-RGGI-Op-Plan-Amendment.pdf.

3.6.9. Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026 – Q1 2027	Channel Partner Outreach & Events	Partner events to be hosted in collaboration and coordination with AIA NY, Passive House Accelerator, and other homebuilder and contractor associations throughout NYS
Q1-Q2 2027	Industry channel partner check-ins	Quarterly check-ins across stakeholder cohorts for ongoing feedback on program uptake and performance
Q2 2027	Program Update	Expand Affordable New Construction Program to include Enhanced Commissioning support
Q2-Q3 2027	Incremental launch Stakeholder Engagement	Host amplified round of stakeholder engagement, including a Program webinar, to provide additional details on Enhanced Commissioning support offering

SECTION FOUR: GENERAL AWARENESS AND EDUCATION SUB-PORTFOLIO

4.1. Description, context, and key objectives

There are two main categories of general awareness and education activities underlying the LMI Portfolio, general marketing and DAC engagement.

- NYSERDA's outbound general marketing efforts will aim at promoting the important benefits of a weatherization-first approach in achieving energy affordability. Secondarily, supporting awareness-level messaging about highly efficient electrification measures and the comfort, health, safety, and reduced energy consumption these technologies offer will aid consumers in making informed decisions when replacing technologies in their homes. All outbound marketing efforts will drive residents to the MyEnergy platform and encourage account creation. NYSERDA will also develop consumer-facing educational materials to be used both in outbound marketing efforts and for use by the Regional Clean Energy Hubs to ensure consistent messaging is being used and helping to grow the trust and confidence in the programs being offered by administrators.
- NYSERDA's DAC engagement is multi-pronged and is underpinned by its Energy and Climate Equity Strategy.[85] It aims to build capacity for more inclusive, meaningful, and diverse stakeholder engagement that centers the experiences of residents in DACs and historically marginalized communities in NYSERDA program planning, policy development, and decision-making.

4.2. Sub-Portfolio/Program Area Tables

Table 17. NYSERDA General Awareness and Education Program Budgets Forecast

General Awareness & Education	2026	2027	2028	2029	2030	2031	Total
Program Budget Plan ($ 000s)	**25**	**3,784**	**13,658**	**16,216**	**18,516**	**102**	**52,300**
DAC Engagement	**25**	**1,709**	**11,583**	**14,141**	**16,441**	**102**	**44,000**
Regional Clean Energy Hubs	0	1,450	11,150	13,650	15,950	0	42,200
Energy Equity Collaborative	0	200	200	200	200	0	800
Disadvantaged Community Consultant Pool	25	59	233	291	291	102	1,000
General Marketing	**0**	**2,075**	**2,075**	**2,075**	**2,075**	**0**	**8,300**

Additional detail on budgets plans, including budget categories and non-program cost considerations, can be found in Appendix C.

[85] Available at https://www.nyserda.ny.gov/All-Programs/Energy-and-Climate-Equity-Strategy

4.3. Program Offering: General Marketing

4.3.1. Program Description

NYSERDA will repeat and build upon past success realized in the NYS Clean Heat and Energy Advisor work through a new NYSERDA/Utility marketing working group focused on growing awareness of energy efficiency solutions and programs. Critical components of these past successes include NYSERDA and utility collaboration, clear identification of roles and responsibilities, shared learnings, and data driven decision making.

This NYSERDA/Utility marketing working group will collaborate in creating a statewide marketing campaign driving residents to the MyEnegy platform. The campaign's primary goal is focused on growing the awareness and benefits of energy efficiency (weatherization) to decrease energy consumption and cost while increasing comfort in homes. The campaign will run statewide and, to maximize budget efficiency, will run seasonally (Spring/Fall) during the heating/cooling shoulder seasons. NYSERDA marketing will work closely with the Program Administrators to monitor and help control the volume of applications. NYSERDA will include LIPA in the working group and coordinate statewide efforts and share learnings. As a first step toward achieving measurable increases in awareness, NYSERDA will manage the campaign to ensure that at least 35 percent of the paid media placements will occur in DACs and will incorporate messages in multiple languages on media channels that are capable of targeting by language.

Secondarily, the campaign will include awareness-level messaging about highly efficient electrification measures (e.g. heat pumps and heat pump water heaters) so customers are aware of the comfort, health, safety, and energy efficiency benefits electric technologies offer for future projects. As an example, LMI customers were not specifically targeted in the 2020-2025 NYS Clean Heat campaign, causing their heat pump benefit awareness level to be behind that of market rate consumers as determined by NYSERDA's research.[86] Due to this lack of awareness, the LMI audience is more likely to believe myths about heat pump technologies being ineffective to provide sufficient heat in cold NYS climates, or retain outdated historical associations that electric heat (electric resistance) is unaffordable. Improving electrification measure awareness will help reduce the common barriers preventing LMI customers from considering these measures where and when the situation makes it an affordable option.

To overcome the numerous challenges LMI customers face in adopting clean energy measures, the awareness and education campaign will consist of repeated exposure and consistent messages focused on clean energy benefits to increase the customer's confidence in, and prioritization of, making investments in these improvements. Based on NYSERDA's research,[87] the biggest energy-related challenge a LMI customer faces is their monthly utility cost, the marketing campaign will focus on building confidence that energy efficiency measures will reduce that cost, and that there are incentives available from the State and/or utilities to help decrease (or in some cases, eliminate) the upfront cost burden to implement the changes. Another core tactic used to repeat exposure, will be a strong re-engagement of the LMI communities in the 2026-2030 marketing strategy. A re-engagement strategy will be developed to align

[86] NYSERDA Annual Statewide Tracking Study https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/About/Tracking-Progress/2025-NYSERDA-Annual-Tracking-Study.pdf
[87] NYSERDA Annual Statewide Tracking Study https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/About/Tracking-Progress/2025-NYSERDA-Annual-Tracking-Study.pdf

and not compete with, or duplicate, the Customer Referral Plan. The re-engagement strategy will be targeted to reach LMI customers who have participated in other related programs (energy assessments, appliance programs) and have not yet weatherized their homes, who have interacted with the MyEnergy platform but have yet to take action (e.g. application submission), or who have deferred past participation with more pointed messages (e.g. incentive availability, new offers, alternative solutions) and executed both from a paid media perspective as well as through the incorporation of trusted co-branded marketing with the customer's specific utility, and the Regional Clean Energy Hubs.

4.3.2. Program Design

The New York Energy Advisor website will remain in place until October 2027 as outlined in the Joint Customer Platform Utility Integration Plan. In October 2027, the EnergyAdvisor.ny.gov website will be absorbed by the MyEnergy platform ensuring customer experience is simplified to avoid confusion, and duplicate information isn't being hosted at the expense of ratepayers in more than one location.

NYSERDA will leverage program-specific marketing to support continuous customer engagement further generating interest in weatherization. NYSERDA will capitalize on that interest with specific and personalized offers, reminding end-use consumers to incorporate energy efficiency improvements while making other home improvements and/or increasing their demand for stand-alone weatherization projects.

4.3.3. Implementation Schedules and Milestones

Timing	Topic	Activity
Q4 2026	Campaign Ads	Phase 2 Launch (November): Additional ad placements begin to go live in alternative languages and channels
	Campaign Report	Reporting schedule and components identified and schedule developed.
	Marketing Working Group Meetings	Working group meets monthly to continue approvals of new assets, review message flighting calendar, and develop reporting structure.
Q1 2027	Marketing Working Group Meetings	Working group meets monthly, topics TBD.
Q2 2027	Marketing Working Group Meetings	Working group meets monthly, topics TBD.
Q3 2027	Marketing Working Group Meetings	Working group meets monthly, topics TBD.
Q4 2027	Marketing Working Group Meetings	Working group meets monthly, topics TBD.

4.4. Program Offering: DAC Engagement

4.4.1. Program Description

NYSERDA's Energy and Climate Equity Strategy[88] guides the DAC Engagement approach for building capacity for more inclusive, meaningful, and diverse stakeholder engagement that centers the experiences of residents in DACs and historically marginalized communities in program planning and development.

[88] Available at https://www.nyserda.ny.gov/All-Programs/Energy-and-Climate-Equity-Strategy

The Energy and Climate Equity Strategy guides NYSERDA's work in both LMI and Non-LMI initiatives and activities.

To bring communities disproportionately burdened by climate change and cycles of disinvestment across energy and economic systems into parity requires recognizing these community stakeholders as essential partners in building an inclusive clean energy economy. NYSERDA's DAC Engagement activities within the LMI EE/BE Implementation Plan continue and expand: the work of the 12 Regional Clean Energy Hubs which lies at the intersection of procedural and distributional equity; the Energy Equity Collaborative (EEC) which supports procedural equity through community-identified actions and recommendations to NYSERDA; the DAC Consultant Pool which addresses procedural equity by creating a pathway for direct participation in clean energy planning for representatives of DACs and LMI stakeholders and; Translation and Interpretation services which support procedural equity through services that enable access and understanding of programs and direct participation of DACs and LMI stakeholders to provide feedback. These programs enable essential community input and participation in programs to ensure objectives of the overall EE/BE portfolio are met.

These programs complement each other by simultaneously providing: a mechanism for New York State residents to gain tailored access to clean energy programs and resources (via the Hubs); a dedicated space for community-based organizations to provide guidance to NYSERDA program design and development (via the Energy Equity Collaborative); and a means for NYSERDA program teams to contract with community-based organizations for services specific to program needs (via the Disadvantaged Communities Consultant Pool).

The Hubs provide a holistic, multifaceted approach including project coordination, marketing and outreach support, partnership building, and leading public education and engagement sessions to meaningfully integrate DAC, LMI and market-rate customers into clean energy programs.

Hub objectives to accomplish this theory of change include:

- Increase awareness of and access to clean energy solutions and opportunities.
- Increase uptake of clean energy projects, with additional support provided when available from relevant local, state and federal programs.
- Increase public participation in energy planning and program coordination activities.
- Increase partnerships and diversity of energy efficiency/building electrification contractors especially in regions where limited contractors exist today.
- Support connections to workforce development opportunities and training resources for residents including individuals residing in DACs and other priority populations.

The Energy Equity Collaborative is a shared space for engagement and collaboration between those that serve and represent historically marginalized communities and NYSERDA, along with other State agencies, to advise on energy equity and climate justice approaches and advance equitable programs. The Collaborative focuses on community-identified, cross-cutting issues for NYSERDA's attention and providing early-stage, high-level feedback on initiatives being planned by NYSERDA and interagency partners.

In partnership with participating stakeholders the Collaborative aims to:

- Promote greater NYSERDA transparency on program design with direct engagement and messaging to CBOs.
- Align with DAC stakeholders on energy and climate equity opportunities at NYSERDA.
- Build DAC stakeholder knowledge and capacity to participate in and provide input into NYSERDA programs, with accountability to feedback provided.

The Disadvantaged Communities Consultant Pool provides a means to compensate CBOs for their time and contributions when informing NYSERDA's programs/initiatives to improve NYSERDA outcomes by way of:

- NYSERDA programs that are informed by a broad range of disadvantaged community representatives (e.g., regional representation, populations served, issue focus).
- Improved procedural equity practices at NYSERDA with deeper levels of community engagement early in the planning process, resulting in greater buy-in and benefits in disadvantaged communities.

Translation and Interpretation Services provide a mechanism for NYSERDA program teams with the infrastructure and capacity to deliver programs equitably across linguistically diverse DAC and LMI stakeholders. Additionally, for LMI and DAC stakeholders these services provide meaningful access to NYSERDA programs, information, resources, and decision-making processes regardless of language. These services:

- Expand program reach by making program information, applications, outreach materials and other resources accessible in languages customers use.
- Improve program accessibility by reducing language barriers throughout the customer journey from initial awareness through application, participation, and project completion.
- Reduce administrative burdens by providing program teams a centralized process for obtaining translation, interpretation and ASL services.

4.4.2. Program Design

Regional Clean Energy Hubs

Established in 2022, the Hubs are located in each of the ten REDCs of New York State. There are twelve Hubs, one in each REDC, with three Hubs in New York City to reflect the additional outreach needed due to population density. Each Hub is made up of community-based organizations embedded in the region they serve. These organizations have an established presence and deep experience spanning critical sectors like clean energy, energy efficiency, workforce and economic development, education, health, and housing.

Through multisector partnerships, Hubs assist individuals, small businesses, and affordable housing owners by providing information about clean energy benefits, ways to reduce energy use and costs, and how to make more informed energy decisions and help applicants understand and apply to NYSERDA and utility EE/BE programs.

As directed by the LMI Order, Non-LMI and LMI funding will be directed towards the goal of increasing NYSERDA and utility program participation and access to resources across all market sectors. Various strategies will be employed by the Hubs to bring greater awareness, education, and adoption of clean energy and weatherization technologies to customers across New York State. An evaluation to

quantitatively assess the effectiveness of the Hubs in generating completed projects and the benefits of those projects including energy savings, bill savings and other non-energy benefits is underway and expected to be complete Q1 2027.

Energy Equity Collaborative

NYSERDA's EEC is a shared space for engagement and collaboration between community-based organizations that serve and represent historically marginalized and disadvantaged communities and NYSERDA, along with other State agencies. The Collaborative is used to advise on energy equity and climate justice issues and advance equitable programs, with a focus on identifying cross-cutting recommendations and advancing action plans on issues of importance to DACs, while allowing space for early-stage, high-level feedback on initiatives under development. The EEC is composed of a 13-member Steering Committee and four topic-specific working groups which are comprised of environmental and climate justice CBOs. The EEC serves as a general advisory body to NYSERDA on DAC engagement and benefits from across its portfolio of clean energy programs. The Steering Committee is focused on shaping the EEC's structure and focus, guiding the development of participation processes and future committee selections, and prioritizing recommendations to NYSERDA from its members while also advising NYSERDA's early-stage planning. The Collaborative's activities are funded by EE/BE and RGGI funding, with RGGI funds supporting the non-EE/BE activities.

Disadvantaged Communities Consultant Pool

NYSERDA established a mechanism for CBOs and other entities, as well as Indigenous Nations and Indigenous-led Organizations, serving or representing DACs to be compensated for their time and contributions when informing NYSERDA's programs and planning initiatives. Organizations are pre-qualified using RFQL 4922, the DAC Consultant Pool, which re-opened in August 2025 as an open enrollment solicitation available on NYSERDA's website[89] with applications accepted through December 2030, and specific due dates for each round of application reviews transparently posted on NYSERDA's Current Solicitations and Funding Opportunities webpage. Over time, the DAC Consultant Pool will expand the number of existing qualified CBOs serving and representing DAC organizations.

A range of organizations are eligible to apply, including grassroots advocacy organizations, faith-based groups, environmental and climate justice organizations, as well as individual nonprofits and coalitions based in and with a substantial connection to those residing in DACs. Organizations that meet the minimum qualifications are then issued zero-dollar umbrella contracts from NYSERDA. As needs arise, DAC Consultants within the Pool are then provided with task work orders and funding to provide services across multiple programmatic areas, supporting teams with distinct, high-impact projects on an as needed basis. Qualified DAC Consultants are available to work with NYSERDA staff through a variety of paid opportunities. These can include advising on barriers and needs in communities, recommendations for potential programs, feedback on program design or participation in co-design workshops, meeting/workshop facilitation, or assistance with community outreach.

The DAC Consultant Pool will be leveraged to form the RLDAG that will engage LMI and DAC-representing consultants to provide input and feedback on pre-weatherization, energy efficiency and

[89] DAC Consultant Pool (RFQL 4922), available at: https://www.nyserda.ny.gov/Funding-Opportunities/Current-Funding-Opportunities

electrification and related elements of residential LMI programs on an ongoing basis, as described in greater detail below.

4.4.3. Program Services

Regional Clean Energy Hubs

Regional Clean Energy Hubs focus on primarily single-family housing within DACs and LMI customers. Beginning in 2026, Hubs will broaden their focus to include programs intended to serve multifamily buildings and market rate customers. Hubs will connect market participants to concierge service contractors for the AMP-Up Program by providing tailored outreach, program coordination, and technical support.

- *Project Management and Coordination Assistance:* Hubs will continue to create meaningful customer connections within the regions they serve and provide Project Management and Coordination Assistance to customers. Hubs will verify customer eligibility for NYSERDA and utility programs and provide referrals to those programs. Hubs will guide and support the customer through the application process, often coordinating NYSERDA or utility-funded projects with other local, state, or federal programs and resources to provide the maximum benefit to the customer.
- *Outreach and Awareness:* Hubs will continue to use a boots-on-the-ground approach to educate and share program information with customers across NYS. This includes participating in events such as community festivals, food pantries, home shows, and career fairs to increase visibility of the services provided by the Hubs and programs offered by NYSERDA, utilities and other relevant organizations/state agencies. Hubs also deliver energy literacy and energy education workshops to provide customers with self-install energy saving measures, explain clean energy technologies, and help residents better understand their utility bills. These workshops are held in every county of NYS as stand-alone events and in conjunction with already-occurring community events.
- *Equitable Engagement and Regional Capacity Building*: Hubs have developed and will continue to update their Regional Assessment and Barriers Analysis[90] every two years, as needed to assist in the development and strategy of their Outreach and Equitable Engagement Plans. Together these reports provide a framework for how the Hubs will carry out their work and collect feedback to share with NYSERDA and utility program teams to inform program design and development. NYSERDA will utilize feedback for program improvements and/or design and development. Updated Regional Assessment and Barrier Analysis reports will be published on the NYSERDA website, Regional Hub websites and filed with DMM.
- *Partnerships:* To expand the Hub network of participating organizations, Hubs will continue to foster existing, and form new, relationships with partners operating in DAC, LMI, and market rate sectors to improve access to and accelerate participation in clean energy programs.

[90] Regional Clean Energy Assessments are available through Regional Clean Energy Hubs websites. Access to the Regional Clean Energy Hubs website information is available here: https://www.nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs.

Energy Equity Collaborative

The EEC was established to build constructive relationships between NYSERDA and community organizations representing disadvantaged communities and advance transparency and accountability. As an advisory body, it elevates energy and climate equity issues and works with NYSERDA and participating interagency partners to align on equitable program and planning development opportunities. The EEC also advises on the development of information, tools, and program resources that address barriers for disadvantaged communities related to clean energy programs. Its steering committee provides strategic guidance and recommendations to NYSERDA and works to build relationships and exchange information with NYSERDA leadership and agency partner participants on key cross-cutting topics related to energy efficiency and clean energy programs and planning. The EEC's recommendations to NYSERDA are derived from the Steering Committee and four working groups, listed below, which were launched in 2024 in consultation with the Steering Committee. Each working group is tasked with developing Action Plans and recommendations that are reviewed with the Steering Committee prior to formal submission to NYSERDA. The scope of each working group is as follows:

- Building Energy Efficiency and Electrification: Aims to improve outreach to DAC renters and homeowners, enhance collaboration with state agencies, and remove barriers to accessing NYSERDA, utility and other resources for home and building electrification.
- Energy Technologies: Focuses on inclusive design and community accountability for renewable and other zero emission energy projects and clean transportation initiatives, disseminating accessible program information, and fostering equitable community ownership of clean energy projects.
- Workforce and Economic Development: Works to create pathways into energy sector careers, ensure community benefits from clean energy projects, and boost Minority- and Women-Owned Business Enterprises (MWBE) and Service-Disabled Veteran-Owned Businesses (SDVOB) participation in energy initiatives. This working group does not fund workforce development initiatives but helps to inform program delivery.
- Engagement and Access: Develops frameworks for engagement and governance to improve procedural equity, transparency, and accessibility in NYSERDA clean energy planning and climate and energy programs.

NYSERDA program teams may seek early-stage input and occasionally update the Energy Equity Collaborative working groups and steering committee on programs and separate program-driven stakeholder engagement initiatives as appropriate. Given the EEC's focus on cross-cutting topics and community-identified Action Plans and recommendations, residential LMI program requirements for stakeholder input may be better addressed via the RLDAG which is tailored to address the specific LMI-focused DAC program design and implementation needs.

Disadvantaged Communities Consultant Pool

Energy Equity Collaborative: To be eligible to join an EEC Working Group or the Steering Committee, the entity must be a current member of the DAC Consultant Pool, with the exception of Indigenous Nations and organized labor representatives.

Residential LMI and DAC Advisory Group): NYSERDA has regularly received feedback from LMI housing community advocates and DAC stakeholders about fatigue and challenges from past engagement in highly technical discussions that lacked tailored support for community participation. To provide a

dedicated space for LMI and DAC engagement and to ensure meaningful and equitable participation of those representing LMI residents and DACs, NYSERDA will leverage the DAC Consultant Pool to form a dedicated advisory group of community-based organizations serving LMI residents within geographic disadvantaged communities, and those outside of DACs, to inform the design and implementation of various programs included in this LMI Implementation Plan. The RLDAG will be a forum to provide focused community-based stakeholder engagement to help ensure the residential buildings programs noted in this Implementation Plan are informed and enhanced by community experience and expertise. The feedback from this tailored group will be factored equally in with the complementary industry stakeholder feedback received from the RMAG.

DAC stakeholder input and feedback will be essential to developing effective single-family and multifamily program strategies that address diverse barriers and opportunities for LMI housing in geographic disadvantaged communities and LMI housing statewide. The RLDAG will convene on a regular basis and may be organized into subgroups to meet program needs and depending on stakeholder expertise and interest. Its composition will be developed to ensure diverse DAC community stakeholder views, experience, expertise, and geographic location needed to inform the programs. Its scope of work and meeting frequency will be based on program needs, timelines, and budgets. The RLDAG will provide insights on program design strategies and elements to improve outcomes for LMI households statewide and with specific attention to diverse geographic DACs, for which tailored solutions can be essential. NYSERDA will coordinate with DPS and utilities where appropriate to share insights, implement best practices, and align approaches to serving DACs in residential programs.

While the RLDAG's perspectives will be central to shaping program strategies, all recommendations will be considered within the broader framework of program guidelines. These guidelines are designed to ensure programs are grounded in fiscal responsibility, regulatory compliance, transparency, and provide market continuity while delivering solutions that work for residents.

Translation and Interpretation Services

NYSERDA has contracted with Language Line Services Inc. to provide equitable access to its programs and services by offering translation, interpretation, and American Sign Language (ASL) support to NYSERDA program teams and contractors. These services will be provided in the fifteen (15) most commonly spoken languages (Spanish, Cantonese, Mandarin, Russian, Hebrew, Haitian Creole, Italian, Bengali, French, Arabic, Urdu, Tagalog, German, Polish and Korean) in New York State, with the ability to add additional languages as requested. Services may include but are not limited to written translation, ASL interpreters, consecutive or simultaneous interpretation, over-the-phone or video/remote interpretation.

4.4.4. Program Administrative Model

NYSERDA administers the Regional Clean Energy Hubs, the EEC, and the DAC Consultant Pool and specific Task Work Orders to the Pool, including those related to the Residential LMI and DAC Advisory Group. Additional support services are delivered by implementation contractors.

NYSERDA manages each Regional Clean Energy Hub and works closely with program teams to ensure alignment with direction and availability of LMI EE/BE programs. Consultant support services include

developing and maintaining a Microsoft Teams platform for the Hubs to aid in real-time communication, marketing collateral development, and subject matter expertise support.

NYSERDA develops the strategy and manages the operations of the EEC. Additionally, NYSERDA facilitates all EEC Steering Committee and Working Group meetings. Implementation contractor support services include: EEC Steering Committee and Working Group meeting logistical support including scheduling, notetaking, development and distribution of meeting pre-read content, and summarizing meeting follow-up actions; assistance with development of Working Group Action Plans; and organizing quarterly in-person Steering Committee meetings also attended by the Regional Clean Energy Hubs.

NYSERDA program teams utilize the DAC Consultant Pool through executed Task Work Orders with program budgets and scopes of work outlining tasks, deliverables and timelines. Once qualified DAC Consultants are added to the DAC Consultant Pool, NYSERDA program teams can select them from the pool of consultants to do program related work. This includes program advisement, meeting facilitation and/or logistical support, and assistance with community outreach and engagement.

NYSERDA program teams will utilize the Translation and Interpretation services through an internal portal for translation, and a 24/7 hotline for over the phone interpretation requests. Interpretation and American Sign Language that require in-person assistance such as during meetings and hearings will request these services in advance via email.

4.4.5. Utility Coordination

As directed by the LMI Order, NYSERDA will facilitate and support coordination between the Utilities, NYSERDA and DPS to support Hub activities relevant to pertinent program updates, outreach priorities, and resolution of customer concerns. NYSERDA and the Utilities will schedule and host an informational workshop in early 2027 to educate the Hubs on Utility programs, and to establish a regular cadence of meetings to share information and insights. These collaborative opportunities will also serve to generate actionable feedback for Hubs improvement.

In coordination with DPS, Utility Program Administrators will be invited to participate in Residential LMI and DAC Advisory Group discussions to the extent applicable to their LMI programs and needs, including AMEEP. NYSERDA will coordinate with DPS on DAC engagement forums they host related to the implementation of the broader portfolio of EE/BE programs, including non-LMI programs and the LMI programs administered by Con Edison and National Grid. NYSERDA will also share insights from RLDAG that are relevant with DPS and utilities.

4.4.6. Implementation Schedule and Milestones

Timing	Topic	Activity
Q4 2026	Stakeholder Engagement	• Contract with new members of EEC Steering Committee and Working Groups • Convene new EEC Steering Committee and Working Groups • Launch RLDAG
	Program Launch	Continue Regional Clean Energy Hub activities with EE/BE funding and new scopes of work
	Performance Management	Annual Regional Clean Energy Hub's goals/metrics development
Q2 2027	Stakeholder Engagement	Secure first round input on EmPower+ and AMP Up program with RLDAG

APPENDIX A: LIST OF LMI EE/BE STAKEHOLDER ENGAGEMENT SESSIONS

This appendix lists summaries of the 38 engagement sessions, including events, focus groups, and other meetings held throughout the development of the initial LMI Implementation Plan to gather input from stakeholders. Following the list of engagements is a summary of stakeholder feedback themes and discussion. Both sections are categorized by program.

5.1. General – Multiple Programs

July 1, 2025 – Community Partner Engagement with Organizations Representing New York's Disadvantaged and Frontline Communities

- **Session objective:** Discuss and receive feedback on listed programs and their content in the EE/BE LMI Implementation Plan
- **Program discussed:** EmPower+, Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** Community Partners expressed interest in:
    - EmPower+ and MF program design and pricing
    - Regional variation in incentive levels
    - Program prioritization of delivered fuels customers
    - Clarifying and improving program outreach
    - Community priorities playing a larger role during program design discussions
    - Program design based on market insights
    - Protecting energy affordability
    - Visibility into program metrics
    - Program stacking within NYSERDA and with state agency administered programs

July 8, 2025 – Community Partner Engagement with Organizations Representing New York's Disadvantaged and Frontline Communities

- **Session objective:** Discuss and receive feedback on listed programs and their content in the EE/BE LMI Implementation Plan
- **Program discussed:** EmPower+, Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** Community Partners expressed interest in:
    - EmPower+ and MF program design and pricing
    - Regional variation in incentive levels
    - Program prioritization of delivered fuels customers
    - Clarifying and improving program outreach
    - Community priorities playing a larger role during program design discussions
    - Program design based on market insight
    - Protecting energy affordability
    - Visibility into program metrics
    - Program stacking within NYSERDA and with state agency administered programs

August 5, 2025 – LMI EE/BE Implementation Plan Stakeholder Conference – Downstate

- **Session objective:** Discuss initial design considerations for programs in the EE/BE LMI Implementation Plan and hold forum for stakeholder input

- **Program discussed:** EmPower+, AMEEP, Technical Assistance, Housing Agency Partnerships, and Disadvantaged Community Engagement
- **Participant type(s):** Building owners/managers, consultants, contractors, developers/builders, disadvantaged community service providers, educational institutions, environmental and climate justice advocates, local government representatives, state government representatives, homeowners, implementers, information management / software companies, manufacturers, nonprofit organizations, product suppliers, renters, trade associations, utility representatives, and wholesalers
- **High-level takeaways:** Participants provided comments on streamlining AMEEP and NYSERDA's technical assistance offerings, and the need for financial assistance to help building owners electrify, particularly in communities that rely on oil for heating and hot water. Regarding EmPower+, participants commented on prioritizing customers (such as DAC engagement), health and safety needs, and measure package and incentive options.
- A Summary Report of the conference, along with the day's presentations, was filed on DMM under Case 25-M-0249.
    - Summary Report: https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={00BD0F99-0000-C41A-ADF3-3005916E75D3}
    - Downstate Stakeholder Conference slide deck: https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={F0BC0F99-0000-CA10-80A6-CAA5CEB12AD9}

August 7, 2025 – LMI EE/BE Implementation Plan Stakeholder Conference – Upstate

- **Session objective:** Discuss initial design considerations for programs in the EE/BE LMI Implementation Plan and hold forum for stakeholder input
- **Program discussed:** EmPower+, Affordable Multifamily Program Upstate Program, Housing Agency Partnerships, and Disadvantaged Community Engagement
- **Participant type(s):** Building owners/managers, consultants, contractors, developers/builders, disadvantaged community service providers, educational institutions, environmental and climate justice advocates, local government representatives, state government representatives, homeowners, implementers, information management / software companies, manufacturers, nonprofit organizations, product suppliers, renters, trade associations, utility representatives, and wholesalers
- **High-level takeaways:** Participants provided comments on the Upstate affordable multifamily program design, noting the need to expand availability of eligible contractors to work with. Participants also provided comments on EmPower+ around health and safety, noting that issues such as mold and vermiculite are often found in Upstate region homes.
- A Summary Report of the conference, along with the day's presentations, was filed on DMM under Case 25-M-0249.
    - Summary Report: https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={00BD0F99-0000-C41A-ADF3-3005916E75D3}
    - Upstate Stakeholder Conference slide deck: https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={F0BC0F99-0000-CC4A-96B4-00305E505F15}

5.2. EmPower+

EmPower+ maintains a robust series of meetings on programs operations and design including a Single Family Program Update monthly meeting for contractors, Hubs, and community groups, 3 monthly

meetings with the Clean Energy Hubs, one regular meeting with the BPCA with ad hoc meetings as needed, and quarterly meetings with the RMAG that consist of Community members. Contractors, distributors, and manufacturers meeting to discuss issues relevant to single family programs. This series of meetings leads to a constant feedback loop of program information sharing, feedback, and adjustment.

July 16, 2025 – BPCA Monthly Meeting

- **Session objective:** Discussed major changes to Empower+ program called for in the EEBE plan including 50 percent project cost cap for moderate income, package4 pilots, pre-weatherization Health and Safety and differential incentive levels by region of the state.
- **Program discussed:** EmPower+
- **Participant type(s):** Contractors
- **High-level takeaways:** Many contractors felt that reviving the 50 percent project cost cap for moderate income would make it harder to complete projects. They did not feel like there should be caps on Health and Safety spending so the program can fix all issues found in a home. If the program is going to limit production, it should do so before the customer gets to the contractor (at the application stage.)

July 30, 2025 – BPCA Follow Up Call

- **Session objective:** Receive feedback through in-depth discussion of possible package models for EmPower+
- **Program discussed:** EmPower+
- **Participant type(s):** Sub group of BPCA board
- **High-level takeaways:** Contractors are concerned that packages will lead to more customer contributions during bigger projects. They were curious if the packages include cost effectiveness requirements. They noted that packages do not account for all the intricacies of older homes. The trade association would like to be central to developing any package system.

October 28, 2025 – Residential Market Engagement Group

- **Session objective:** Discuss multiple topics related to NYSERDA LMI and Market Rate Programs
- **Program discussed:** EmPower+
- **Participant type(s):** Contractors, distributors, community groups
- **High-level takeaways:** There was a discussion over the use of measure packages to improve speed of the project approval process and increase customer understanding of program benefits. Participants expressed concern that packages would confuse the project approval process and present risks to the financial make up of a project.

5.3. AMEEP

July 16, 2025 – Listening Session #1 - Affordable MF Electrification

- **Session objective:** Provide overview of the upcoming Affordable Multifamily Electrification program and discuss input from contractors, building owners, and other industry partners
- **Program discussed:** AMEEP
- **Participant type(s):** Contractors, building owners, other industry partners
- **High-level takeaways:** Participants emphasized coordination with other programs/funding sources to reduce duplicative work, specifically in instances where weatherization was completed through other programs. Participants also emphasized the importance of ventilation upgrades for heat pump performance, even when not tied to energy savings, presenters noted that health and safety measures like this will be the focus of a future listening session. Participants highlighted the need for clear eligibility rules/determination and that Program Administrators need to take care to ensure projects doing full renovations are not doing so to de-regulate rent.

July 23, 2025 – Listening Session #2 - Affordable MF Comprehensive

- **Session objective:** Provide overview of budgets and requirements from the May Order, a recap on AMEEP's design and participation level today, and discuss initial thoughts on changes to program design with contractors, building owners, and other industry partners.
- **Program discussed:** AMEEP
- **Participant type(s):** Contractors, building owners, other industry partners
- **High-level takeaways:** Participants provided great insight on how they see contractors and project management working today and what types of project financing they've encountered in AMEEP projects, while recognizing there is still a gap in financing availability. Participants acknowledged that projects working through technical assistance offerings to date have experienced long timelines, but programs like SAMES are promising if there is better program integration. Participants also note that they find the current program to have insufficient incentive levels, rigid program requirements, and slow processes.

5.4. Affordable Multifamily Program Upstate Program

In Fall 2024 to Spring 2025, NYSERDA conducted stakeholder engagement sessions to inform program design. There were six working groups developed during that effort: Program Structure and Technical Scope Working Group, Pipeline Building Working Group, Program Coordination Working Group, Financing Working Group, Workforce Development Working Group, and Inter-Program Coordination Working Group. These working groups included public housing authorities, upstate building owners/managers, upstate contractors, Regional Clean Energy Hubs, community-based organizations, financial lenders, and HCR. Details about these working groups are found below. NYSERDA leveraged established relationships with these stakeholders to further promote the Upstate program.

September 4, 2024 – Financing Working Group Kickoff

- **Session objective:** Obtain initial feedback on program design straw proposals
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Lenders, energy service provider, housing agencies
- **High-level takeaways:** The program needed to assess what capital is available and what total blended sources are available. Participants noted that it would be advantageous to have a bridge vehicle that takes incentives. Costs will be impacted by building typology and work scope so the financing solutions could also be segmented.

September 5, 2024 – Program Coordination Working Group Kick-off

- **Session objective:** Obtain initial feedback on program design straw proposals
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholders, lender, housing agencies
- **High-level takeaways:** Participants expressed interest in stacking rate payer and non-rate payer funds. Participants also noted the new program should allow for natural gas conversions. Regarding a common building type that is difficult to capture in a program, the audience identified small multifamily buildings of 5-10 units, natural gas and delivered fuel buildings, and buildings that require asbestos remediation.

September 11, 2024 – Pipeline Building Working Group Kick-Off

- **Session objective:** Obtain initial feedback on program design straw proposals

- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Housing authorities, energy service provider, property management company, CBO stakeholders
  High-level takeaways: Many state programs are targeted to buildings that are 60 units or more but layering financing for a 20-30 unit building is difficult. Participants suggested that the program have a focus on small multifamily buildings. Split incentives and difficulty of owners to charge tenants for work (e.g., by increasing rents) will make it difficult to entice buildings owners to take on energy efficiency or building electrification projects. Participants also noted that infrastructure often needs to be upgraded before energy retrofits can start. Lastly, regarding communication, participants noted importance of having a clear website to communicate the program, as well as interest in seeing the program presented at conferences to share program details and hold opportunities for stakeholder feedback.

September 19, 2024 – Program Structure and Technical Scope Working Group Kick Off

- **Session objective:** Obtain initial feedback on program design straw proposals
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Energy service providers
- **High-level takeaways:** Participants noted an interest in having one door for all Upstate program applications, inclusive of technical assistance to reduce redundancy of several applications. It was also noted that there can be a lag between application submitted and notice to proceed/offer letter, and as the offer letter is needed to proceed with development and construction, ideally the time between application and initial offer should be no more than 4 weeks. Having pre-qualified packages could be very helpful to expedite projects, such as: lowest level of packages would be prescriptive measures, second level would involve heating systems and DHW, and third level would include deeper energy retrofits (e.g., exterior insulation, ventilation).

October 7, 2024 – Inter Program Coordination Working Group

- **Session objective:** Align various program requirements with the Upstate multifamily program
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Housing agencies, lender, CBO stakeholders
- **High-level takeaways:** Larger public housing authorities (PHAs) often have teams to navigate different program requirements and co-fund measures with WAP. Smaller PHAs would benefit from having a one stop shop and additional resources to support program participation. There is work needed to align program requirements with WAP and Climate Friendly Homes Fund.

October 8, 2024 – Program Structure and Technical Scope Working Group

- **Session objective:** Discuss how the Upstate multifamily program should be structured and what should be the technical requirements
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Housing agency, energy service providers
- **High-level takeaways:** Participants shared health and safety issues that have required pre-weatherization remediation work and energy service providers shared typical remediation costs that they budget for, which can range from 7 - 25 percent of the total project cost. They flagged that historic preservation can present unique issues and there could be interest in having a designated pathway for those buildings. They noted that project delays have been caused by supply chain issues, electrical service upgrades, and tenant management.

October 15, 2024 – Pipeline Building Work Group

- **Session objective:** Discuss strategies to develop project pipeline
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Energy service provider, CBO stakeholders, housing authorities
- **High-level takeaways:** Participants suggested having a one stop shop that creates a "no-wrong door network" that would enable projects to participate in the program no matter where they start. They noted that in rural areas, they tend to do smaller projects and that standalone energy efficiency projects are not doable unless there is braided funding. There is interest in having an aggregator to support NOAH or PHAs.

October 16, 2024 – Financing Working Group

- **Session objective:** Discuss how financing can be integrated into the program
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Energy service provider, lenders, building owner
- **High-level takeaways:** Participants stated interest in having an aggregator for the Upstate market that would support project intake and organize funding. There is interest in having a one stop shop that organizes the capital. They discussed potential financial solutions, such as creating a cohort of lenders, creating a universal intake form, targeting pre-development work, and using ENERGY STAR Portfolio Manager for tracking.

October 25, 2024 – Workforce Development Working Group

- **Session objective:** Discuss the workforce needs to support an Upstate affordable multifamily program
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholders, housing authority, workforce development firm
- **High-level takeaways:** There is a need for a comprehensive workforce study, particularly to understand wrap-around services for participants transitioning careers or re-entering the community post-incarceration. Participants noted that training opportunities should be better coordinated to consolidate existing resources. Insurance rates and worker's compensation requirements, as well as daycare and transportation costs, can be barriers for small businesses.

November 13, 2024 – Meeting with Lender

- **Session objective:** Gain an understanding of finance options for affordable multifamily projects
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Lender
- **High-level takeaways:** Participant recommended having a consolidated way to deploy financing and give flexibility for providing bridge loans that fill market needs. They suggested that NYSERDA’s goal be to consolidate both the loan and grant side. It was also noted that the program could offer a service for lenders to generate a pipeline of projects and provide needed information on asset data and energy monitoring of the project.

November 16, 2024 – Meeting with Housing Agency

- **Session objective:** Discuss with housing agency development directors how the new program could fit into their capital stack for rehabilitation projects
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Housing agency
- **High-level takeaways:** There is some work still needed to align housing agency funding and Upstate program funding for public housing authorities, including a focus on stacking mid-cycle programs and aligning program requirements.

December 5, 2024 – Meeting with Energy Service Provider

- **Session objective:** Get feedback from energy service provider about the Upstate multifamily program design
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Energy service provider
- **High-level takeaways:** Participant has been an active energy service provider in the Upstate affordable multifamily market. Meeting was an opportunity to get their feedback on the program design. They suggested having a cohort of projects that could help with cost compression, encourage stacking of programs to support electrification, and recommend financial solutions that would enable contractors to get paid earlier in the process.

December 10, 2024 – Meeting with Housing Agency

- **Session objective:** Discuss how the Upstate multifamily program could best serve Upstate PHAs
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Housing agency
- **High-level takeaways**: Early intervention for PHAs is critical and PHAs have different capacities to oversee energy efficiency and beneficial electrification projects. Participant noted having early communication about the opportunity is critical for PHAs to determine if they can take advantage of the program. It was also noted that the program should focus on providing technical assistance and then transfer customers to concierge service.

February 18, 2025 – Public Housing Authority Focused Customer Experience Mapping

- **Session objective:** Discuss the Upstate multifamily program design and get feedback from Upstate public housing authorities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Public housing authorities, housing agency, lender
- **High-level takeaways:** The discussion covered how the program fit into participants' current rehab and refinancing cycle and where the opportunities are for alignment. In terms of financing, debt products may not be a good fit for PHAs. The funding source for true capital planning process is Rental Assistance Demonstration (RAD) funding. Augmenting that and adding funds would be helpful for PHAs. PHAs also indicated having support for building operations (inventory of equipment, age of equipment, electrical service, maintaining historical energy data) would be helpful. PHAs could piggyback on "pre-procured" contracts that NYSERDA has rather than having to go through their own procurement process.

February 21, 2025 – Naturally Occurring Affordable Housing Focused Customer Experience Mapping

- **Session objective:** Discuss the Upstate multifamily program design and get feedback from the perspective of naturally occurring affordable properties
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Contractor, lender, energy service provider
- **High-level takeaways:** Participants noted that support services are needed for NOAH projects to be successful, specifically financing, concierge service, health and safety remediation. There are challenges interacting with tenants and finding contractors, and concierge would be a useful service if it could address those issues. Building owners have a difficult time navigating all program opportunities, so it would be a useful service to consolidate programs for owners. Participants also discussed affordability solutions for electrification projects and how the program could require certain actions to be taken (such as, no shifting of heating costs to tenants). It was also shared that the most cost-effective building to electrify is oil-heated buildings, but

uninsulated and inefficient buildings running on natural gas could also be cost effective to electrify. Health and safety issues are often time not known until construction starts so it's hard to plan for.

June 10, 2025 – Upstate Affordable Multifamily Listening Session

- **Session objective:** Learn about Upstate multifamily landscape needs from Upstate-focused affordable housing-related entities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholder
- **High-level takeaways:** Participant discussed the need for better coordination between ratepayer building electrification programs and the Home Energy Assistance Program (HEAP), noting that low-income customers switching to heat pumps may lose access to HEAP benefits because HEAP does not currently recognize heat pumps as an eligible heating technology. Participant also discussed concerns about how to bring along natural gas customers in EE/BE work.

June 13, 2025 – Upstate Affordable Multifamily Listening Session

- **Session objective:** Learn about Upstate multifamily landscape needs from Upstate-focused affordable housing-related entities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholder
- **High-level takeaways:** Participant noted that buildings with 5 units or fewer are the most common building type in the western New York region and noted it's difficult to find support for conceptualizing EE/BE projects with this size project. Further, the NYSERDA website is not user friendly and finding resources and administrative support is difficult. Meeting attendees noted that NYSERDA's new Owner's Representative Services program will be a useful resource to address these needs.

June 13, 2025 – Upstate Affordable Multifamily Listening Session

- **Session objective:** Learn about Upstate multifamily landscape needs from Upstate-focused affordable housing-related entities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholder
- **High-level takeaways:** The participant noted that health and safety issues can keep multifamily buildings from passing inspection and creativity in related incentives may help peak building owner interest to pursue upgrades. Further, having a more robust network of contractors would be helpful, especially in the Upstate region. To do this, there need to be more training opportunities to get people into the field and investing in resources like Energy Advisor.

June 17, 2025 – Upstate Affordable Multifamily Listening Session

- **Session objective:** Learn about Upstate multifamily landscape needs from Upstate-focused affordable housing-related entities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholder
- **High-level takeaways:** While the participant does not work primarily in multifamily buildings, the organization has begun to interface with some properties but are finding that not all home contractors work with the multifamily space. Further, many of the multifamily building owners do not have the resources to interface with larger contracting firms to pursue items like audits, and that leaves a gap to get projects started.

July 3, 2025 – Upstate Affordable Multifamily Listening Session

- **Session objective:** Learn about Upstate multifamily landscape needs from Upstate-focused affordable housing-related entities
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CBO stakeholder
- **High-level takeaways:** Similar to other listening sessions, this participant noted that finding the right contractors, who are also willing to take on smaller projects, is an issue to pursuing EE/BE projects. The participant also noted that in the region they serve, 70 percent is served by oil for heating and hot water, which means that programs like AMEEP are only available to a small subset of the community. It was also shared that funding programs need to ensure incentives are right sized for Housing Development Fund Corporation communities.

August 14, 2025 – Upstate Affordable Multifamily Focus Group – Contractors

- **Session objective:** Provide overview of Upstate affordable multifamily program design and discuss input from contractors in the field
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Contractors
- **High-level takeaways:** Participants sought information regarding the Upstate affordable multifamily program's overlap with weatherization assistance programs, as well as if support for marketing and finance would be included in services. Participants also discussed the need to avoid cost shift to tenants and to target buildings that are heated with oil.

August 19, 2025 – Upstate Affordable Multifamily Focus Group - Building Owners

- **Session objective:** Provide overview of Upstate affordable multifamily program design and discuss input from building owners in the field
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Building Owners
  High-level takeaways: Conversation during this focus group was primarily around support for capital needs assessments and structure around project costs. Participants noted project payments to the owner instead of contractor are preferred and that up front capital can be useful. There was also discussion on health and safety, noting that remediation costs need to be considered.

August 21, 2025 – Upstate Affordable Multifamily Focus Group – Contractors

- **Session objective:** Provide overview of Upstate affordable multifamily program design and discuss input from contractors in the field
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** Contractors
- **High-level takeaways:** The focus group discussed topics regarding the Upstate affordable multifamily program and electrification, technical assistance, health and safety, and program management. Financing opportunities were also identified as a need for smaller projects as well as an owner's representative services / concierge service to support projects. Health and safety projects - such as roof and mold repairs / remediation - were also identified as areas that need support as they can often stop a project from moving forward

October 2, 2025 – Program Structure and Potential Areas of Collaboration

- **Session objective:** Obtain feedback on program design and identify areas for potential collaboration after program launch
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CDFI

- **High-level takeaways:** Participant requested clarity regarding how the Upstate affordable multifamily program approach would be different from AMEEP or other programs currently in the marketplace. There was also discussion around expectations on program release to enable participant to better manage expectations of their members. Participant discussed that CDFIs are reluctant to provide their members with technical assistance as their resources are limited and that support in this area is welcome. Participant also discussed importance that support provided by CDFIs through participating in the referral network should benefit CDFIs and not commercial banks.

October 6, 2025 – Program Structure and Potential Areas of Collaboration

- **Session objective:** Obtain feedback on program design and identify areas for potential collaboration after program launch
- **Program discussed:** Affordable Multifamily Program Upstate Program
- **Participant type(s):** CDFI
- **High-level takeaways:** Participant noted they primarily work with startups, so do not directly work with the core target audience of multifamily building owners. However, there is an opportunity for them to serve as a program referral source for startups working with LMI building owners to increase awareness of the program.

5.5. Disadvantaged Communities Engagement

July 3, 2025 – Community Partner Engagement with Organizations Representing New York's Disadvantaged and Frontline Communities

- **Session objective:** Discuss and receive feedback on the Regional Clean Energy Hubs portion of the Disadvantaged Communities Engagement section of EE/BE LMI and Non-LMI Implementation Plans
- **Program discussed:** Disadvantaged Communities Engagement
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** Topics discussed included EE/BE Order Non-LMI and LMI funding, funding allocation for the Regional Clean Energy Hubs, Hub coordination, and program implementation and design. Participants expressed a continued interest in strengthening partnerships with state agencies and utilities and expanding the program to better support multifamily programs. Participants shared a need for greater clarification about expanding the program to serve market-rate customers in addition to the DAC and LMI customers already served through the program.

July 10, 2025 – Community Partner Engagement with Organizations Representing New York's Disadvantaged and Frontline Communities

- **Session objective:** Discuss and receive feedback on listed programs and their content in the EE/BE LMI and Non-LMI Implementation Plans
- **Program discussed:** Disadvantaged Communities Engagement
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** Community Partners expressed interest in being more involved in budget determinations. Program design, particularly for programs focused on multifamily buildings, should include more robust community partner engagement. Program marketing and outreach need focused attention and improvement. Translation and interpretation services should be broader, with more streamlined access. Collaboration among the Energy Equity Collaborative and the Regional Clean Energy Hubs should continue to be a priority. NYSERDA should continue to compensate representatives of disadvantaged and environmental justice communities.

July 15, 2025 – Community Partner Engagement with Organizations Representing New York's Disadvantaged and Frontline Communities

- **Session objective:** Discuss and receive feedback on listed programs and their content in the EE/BE LMI and Non-LMI Implementation Plans
- **Program discussed:** Disadvantaged Communities Engagement
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** Community Partners expressed interest in being more involved in budget determinations. Program design, particularly for programs focused on multifamily buildings, should include more robust community partner engagement. Program marketing and outreach need focused attention and improvement. Translation and interpretation services should be broader, with more streamlined access. Collaboration among the Energy Equity Collaborative and the Regional Clean Energy Hubs should continue to be a priority. NYSERDA should continue to compensate representatives of disadvantaged and environmental justice communities.

September 25, 2025 – Report Back to Community Stakeholders (Energy Equity Collaborative and Clean Energy Hubs)

- **Session objective:** Report back to stakeholders on how previous engagement was included into the implementation plan
- **Program discussed:** Multifamily, Single Family, ECE, Workforce Development
- **Participant type(s):** CBO stakeholders
- **High-level takeaways:** This session was an accountability milestone for reporting back to community partners on what was heard during the series of six engagement sessions hosted by NYSERDA's Energy and Climate Equity team in July 2025. Community Partners had an opportunity to make any needed adjustments to NYSERDA's interpretation of feedback received and hear from NYSERDA about how or when feedback can or cannot be incorporated into EEBE Order Implementation Plans or the implementation phase of EEBE Order-related activities.

5.6. Stakeholder Feedback Themes and Discussion by Program

5.6.1. 1-4 Family Empower+

1. In light of the Customer Referral Plan's focus on coordination between NYSERDA, the utilities, and Hubs, there were many questions on the best method to bring customers into the program.

   Discussion:
   Stakeholder feedback included ensuring that there is more collaboration across program partners, including utilities, NYSERDA, contractors, and the Hubs around data sharing and outreach. Continuing to engage the Hubs and contractors for outreach was emphasized in order to reach all customers, especially given the pause for contractors to submit applications on behalf of their customers. Other outreach ideas included incentivizing previous participants of the program, existing community members, and non-Hub CBOs to submit referrals, after providing them with standardized training. Stakeholders also recommended shifting to more targeted outreach methods that are data driven.

   Status:
   The Customer Referral plan calls for close collaboration with the Hubs in ensuring that utility referrals have the best possibility in becoming active Empower+ customers.

The program will also continue to work with the Hubs and contractors on the best way to help customer apply for the program while being responsible about the program pipeline. EmPower+ will not be able to expand the ability on non-Hub or non-contractor entities to submit applications, especially for reimbursement. The EEBE order provides for a specific set of priority customers that requires centralized focus for outreach.

2. The order calls for EmPower+ to use up to 10 percent of the program incentive budget on health and safety including assisting customers deferred by the program due to household conditions with enhanced pre-weatherization Health and Safety funding.

   Discussion:
   Health and Safety was a theme during the sessions, specifically with a focus on asbestos, exhaust and ventilation systems, mold, and lead. NYSERDA explicitly sought stakeholder input regarding how the program's health and safety funding allowance of up to 10 percent of total program budgets could best be used. Stakeholders mentioned that gas stoves also should be considered as health and safety issues. There was a suggestion for funding to help with relocating customers temporarily in order to address health and safety issues. Stakeholders suggested creating a questionnaire on what health and safety issues they have noticed for property owners or tenants to provide to their contractor. Pre-weatherization Health and Safety, particularly for deferred customers was also a topic of major interest. Many stakeholders indicated that NYSERDA should use health and safety funds to do as much work as possible on homes with deferred maintenance to assist the owners with making the home ready for weatherization.

   Status:
   NYSERDA is seeking to use the groundwork laid by the Healthy Homes Value Based Pilot to create a Health and Safety pilot that can serve homes that have been deferred by the Empower+ program. Based on current budget estimates, this funding will be between $2.5 and 3 million a year. Given the scope of need for pre-weatherization Health and Safety, this amount will enable NYSERDA to serve a small subset of homes in need while working with the health and Safety programs being deployed by National Grid and HCR GAP funding to determine what resources are needed for a long-term solution to this issue.

3. The program proposed a measure packages model that could simplify paperwork submittal and quicken project submission.

   Discussion:
   Stakeholders at meetings in New York City and Albany shared concerns around simplifying the program into a package system that may lead to lowered quality of work due to New York's diverse housing stock. Community partners suggested the packages would need more categories with specifications and incentive guarantee for the term of the project. Some suggestions for changes included paying incentives based on load reduction and accounting for the vintage of the home. Multiple stakeholders mentioned wanting EmPower+ to go beyond insulation with a packaged approach. Contractors indicated that older homes were typically more complex and that, in a program that covers most of the cost of the installation, packages could reduce the amount of money that contractors get paid.

   Status:

NYSERDA has taken these discussions to heart and is continuing to work on different models of measure packages for review by contractors and community groups. A pilot approach wherein interested contractors trial the packages will be used to ensure this approach will work with the program.

4. NYSERDA is also looking at how heat pumps are incentivized and proposed two different models for incentivizing heat pumps based on the size of the home and the size of the unit.

   Discussion:
   For heat pump installations, stakeholders brought up common issues that include oversizing of units and customers being reluctant to decommission existing systems in order to maintain a back-up system. Stakeholders shared that contractors should be held accountable to their quality of work. Overall, there was a wide range of perspectives shared, with no clear consensus on the best path forward.

   Status:
   NYSERDA will be working with DPS to ensure that heat pump incentives are robust and competitive with Clean Heat incentives from utilities. No decision has been made at this time on the incentive structure.

5. The Order calls for the reinstitution of the 50 percent customer contribution for moderate income customers. The program suspended this requirement in July 2024.

   Discussion:

   Contractors have indicated that the 50 percent rule leads to larger, more complete projects with better customer saving and are supportive of reinstitution. Some stakeholders have indicated that reinstituting the rule will be another financial barrier for moderate income customers and least to less participation by this income segment in the program. The utilities have indicated that the 50 percent requirement will make the market rate incentives they intend to offer more difficult to deploy as they may have to have similar rules.

   Status:

   After discussions with DPS, it was determined that this issue has been codified by the order and cannot be changed in the Implementation plan.

6. The program has focused heat pump installations for customers served by delivered fuel, where the program has a preponderance of positive savings data.

   Discussion:
   Community partners expressed concern about the prioritization of delivered fuel customers resulting in neglecting DAC and LMI end users in urban areas who utilize primarily utility natural gas. One contractor indicated that the focus on delivered fuel customers was inequitable as utility gas customers pay into both the gas and electric SBC and with the cessation of incentives for fossil fuel furnaces, they cannot avail themselves of any incentives for heating systems.

   Status:

NYSERDA is working with DPS on the Energy Affordability Guarantee which will help determine how low-income customers using utility gas can transfer to heat pump space heating in a manner which can ensure energy bill affordability.

7. NYSERDA needs to be able to manage the program pipeline to stay within program budgets.

   Discussion:
   Contractors are concerned with recent moves to limit their ability to submit applications on behalf of the customer. They claim that this will lead to more incomplete applications and may cause some contractors to leave the program due to lack of work.

   Status:
   Historically, word-of-mouth and contractor outreach have driven the majority of lead conversions to NYSERDA's 1-4 family LMI programs. Beginning with the inception of the EmPower+ predecessor programs, Assisted Home Performance and EmPower NY, deployed in 2002 and 2004 respectively, NYSERDA has used a market-driven implementation model. Under this model the program relies on broad outreach, marketing, and the participating contractor network to bring customers to the program. In mid-2025, NYSERDA implemented a temporary pause on accepting applications directly from contractors in an effort to manage the incoming pipeline of projects within available budgets. In March 2026, after successfully leveling the program pipeline and in response to stakeholder feedback, NYSERDA reinstated the option for contractors to submit applications on behalf of their customers with a limitation that this process may only be used for categorically income-qualified households.

8. The EEBE plan and many stakeholders have called for EmPower+ to more equitably serve all regions of New York.
   Discussion:

   Some stakeholders have expressed concern that the NYC region, in particular, has been historically underserved by EmPower+. They have indicated the need for more funding to go to NYC and new pilots to serve the area, particularly for home with pre-existing conditions that need advanced pre-weatherization health and safety.

   Status:
   NYSERDA's data shows that the NYC REDC represents 13 percent of all projects completed statewide in the 5-year period between 2020-2024, despite the effects of COVID which curtailed participation in NYC more severely than other regions of the state in 2020-2021. More recent data shows NYC EmPower+ participation on the rise, representing 17 percent of all projects completed in 2024. Con Edison has also faced challenges in the NYC metro region; noting only 13 percent of its Weather Ready program projects completed in the first half of 2025[91] were located in the NYC portion of Con Edison's territory.

[91] Case 25-M-0248 *Non-LMI Regional Weatherization Program for Residential and Multifamily Customers Implementation Plan* (filed on August 13, 2025) Con Edison notes these concerns in the joint utilities' proposed

In 2021, NYSERDA and National Grid jointly conducted an informal market assessment to develop strategies to broaden the contractor base serving the New York City area. They found that the contractor base providing home improvement services to small residential buildings is disproportionately small in the metro NYC area compared to the population and number of small residential buildings. Contracting firms in the city tend to focus more on new construction and larger scale projects or simply focus on regions outside of the city itself.

NYSERDA will continue to explore methods to have a greater share of the program's projects come from NYC. Methods may need to include limiting applications from other parts of the state and developing specific pilots for this area.

5.6.2. 5+ Multifamily

1. Stakeholders have raised the topic of funding for projects. They proposed a few different approaches to enable more project funding, such as interest in having financial solutions available including bridge loans, enabling incentive payments earlier in the process and enabling the stacking of incentives across programs.

   Discussion
   NYSERDA recognizes the difficulty in building owners being able to cover the upfront capital costs of these projects especially when incentives are provided when the project is completed. One suggestion that was made was to establish a bridge loan that could be issued when the project is initiated to subsidize the upfront capital costs but is repaid when the incentives are issued. Additionally, NYSERDA was encouraged to issue payments earlier in the program process and to allow funding stacking across programs, where possible.

   Status
   NYSERDA is exploring financial solutions that could be offered to program participants and potentially be embedded in the program. The AMP Up program design integrated feedback on incentives where possible. The program will allow for partial payments at program milestones and for projects pursuing the low rise pathway (which is available to small multifamily buildings 1-3 stories and up to 20 units). The incentive is distributed such that more funding will be issued in earlier payment milestones. The Program Administrators are exploring opportunities to leverage EE/BE funds with non-EE/BE funded energy efficiency programs, such as WAP, where possible.

2. Stakeholders expressed interest in having a multifamily program that focused on small multifamily buildings.

   Discussion
   Many stakeholders indicated that small multifamily buildings need more support in order to participate in energy efficiency and building electrification programs. They lack the cash reserves that their larger counterparts have, and are often overlooked by energy service providers who tend to target larger buildings.

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implementation plan for a Downstate market rate weatherization program: "Contractor feedback suggests that the additional costs and challenges caused by working in a dense urban environment, such as commute time and lack of parking, lead them to focus on other jurisdictions that are more profitable."

Status

The new Upstate multifamily program features the low-rise pathway, which provides small multifamily buildings that are up to 3 stories and up to 20 units with a higher incentive cost cap, a more streamlined technical assistance experience compared to larger buildings, and a distribution of incentives that issues more funding in earlier partial payment milestones. Additionally, a concierge service is available to both small and larger buildings to shepherd building owners through the program. NYSERDA is also working to build out its network of energy service providers to include more contractors that service smaller multifamily buildings.

3. Stakeholders offered suggestions to improve customer experience, such as having one common application to access multifamily programs inclusive of technical assistance and end use incentives to avoid redundancy of having to submit several applications. Stakeholders expressed that going through the NYSERDA website and tracking program requirements was challenging and there was interest in consolidating programs and offering more supportive services for participants. Additionally, a suggestion was made to have pre-qualified packages to help expedite projects.

   Discussion

   In past program landscapes, technical assistance and end use incentive programs were separate. Therefore, customers that sought both services were required to submit separate applications, which customers found to be redundant. They also had to navigate the program requirements of two separate programs.

   Status

   The Upstate multifamily program, AMP Up, will have technical assistance embedded in the program so participants will only need to complete one common application to receive technical assistance and end-use incentives. The AMEEP Administrators will coordinate with NYSERDA such that TA is accessible and useful to AMEEP participants with an emphasis placed on reducing processing time and responding to customer need. Furthermore, the concierge service is intended to shepherd participants through the program process. Lastly, the new Upstate program will feature measure categories that include a prescriptive level made up of direct install type measures. Participants will also have the ability to select measures across measure categories providing flexibility in scope of work development.

4. Stakeholders identified pre-weatherization health and safety concerns as an important consideration for affordable multifamily programs as such issues can increase project costs and delay timelines.

   Discussion

   Stakeholders discussed how various pre-weatherization health and safety issues could present a barrier for affordable multifamily projects. The pre-weatherization health and safety issues discussed included but may not be limited to asbestos, lead, mold, inadequate ventilation, and improper insulation practices. Stakeholders stated that LMI households typically have the highest pre-weatherization health and safety needs, and they expressed concerns regarding the ability to assist with homes becoming fully electrified and weatherized due to the limited availability of funds and current shortage on contractors with pre-weatherization health and safety expertise. Stakeholders recommended having holistic technical assistance that would support customers with both the identification and resolution of health and safety issues alongside needed EE/BE support.

   Status

The Program Administrators acknowledge the importance of identifying and responding to pre-weatherization health and safety concerns that may otherwise prevent customer participation in EE/BE programs, yet recognize that more time is needed to explore this opportunity before potentially considering changes to the Upstate affordable multifamily program and AMEEP. In coordination with the AMEEP program, during the 2026 program year, the Program Administrators will emphasize the collection of project data to better understand the specific conditions under which health and safety concerns including, but not limited to, structural deficiencies, ventilation, and mold, which may prevent the installation of energy conservation measures in affordable multifamily buildings.

The Program Administrators will include an update by the end of 2026 on initial findings that could inform the integration of health and safety measures into programs. Furthermore, NYSERDA is in active conversation with NYS Department of Health and HCR around health and safety measures to serve the Upstate affordable multifamily sector.

5.6.3. Disadvantaged Communities Engagement

1. NYSERDA budget designated for translation services

   Discussion:
   Community stakeholders noted that multi-lingual translation and interpretation is an identified need that should include American Sign Language, and make considerations for variable dialects and everyday/informal language usage. They suggested the process for obtaining translation and interpretation services should be streamlined and made more accessible. They noted multiple paths that could be considered for obtaining translation and interpretation services, including the DAC Consultant Pool (Request for Qualifications 4922), leveraging the Regional Clean Energy Hubs, leveraging local organizations such as faith groups, and/or subscribing to a Language Line "hotline" service.

   Status:
   Budget designated for translation and interpretation services will be used for program-specific needs and utilized for translation and interpretation services for New York State's 15 most frequently spoken languages, including American Sign Language. NYSERDA will make a best effort to ensure the translation and interpretation service provider considers variable dialects and everyday informal language. The Energy and Climate Equity team will work with a selected translation and interpretation service provider to ensure services are accessible to a variety of community stakeholders. At the time of community partner engagement, there were no translation and interpretation providers available through the DAC Consultant Pool, but eligible interested providers will be able to apply through the relaunched Request for Qualifications as of August 2025. The Regional Clean Energy Hubs are not scoped to provide the level of translation and interpretation services required for this identified need.

2. Community stakeholder integration into NYSERDA program design

   Discussion:
   Community stakeholders noted a strong interest in facilitated community partner engagement during NYSERDA program design, with emphasis on hearing from those living in multifamily buildings and employing regionally conscious program design that considers the differing needs of DACs in all parts of the state (e.g. urban/rural, Downstate, Upstate). Representatives of the

Regional Clean Energy Hubs expressed particular interest in having a more impactful role in program design, particularly for the Empower+ program.

Status
NYSERDA is broadening paths for obtaining input through the Energy Equity Collaborative and Regional Clean Energy Hubs. The relaunched DAC Consultant Pool Request for Qualifications is being promoted widely to improve regional representation and sector/technology experience to cover a wider breadth of perspectives. Currently, NYSERDA requests feedback from the Regional Clean Energy Hubs, as well as service providers and customers, about the EmPower+ and other programs during critical program design opportunities but notes that stakeholder feedback indicates more robust participation is desired. If an organization that is part of the Regional Clean Energy Hubs would like to have a greater role in program design, they are encouraged to apply to the DAC Consultant Pool in order to participate in EmPower+ and multifamily residential program design via the Residential LMI and DAC Advisory Group noted in this implementation plan, and other opportunities for engagement such as the Energy Equity Collaborative which includes a Housing and Buildings Working Group focused on cross-cutting issues and recommendations based on community partner input.

3. NYSERDA Regional Clean Energy Hub focus on market-rate outreach

Discussion:
Community stakeholders requested clarification on what it means for the Regional Clean Energy Hubs to conduct outreach to market-rate customers, particularly given a perception that this is out of alignment with the Regional Clean Energy Hubs' purpose. In addition, representatives of the Regional Clean Energy Hubs would like to explore ways for the Hubs to coordinate with HCR's Weatherization Assistance Program and other applicable state entities for outreach and any other coordination opportunities.

Status:
Given changes in EmPower+ installation completions anticipated at the time of the Implementation Plan filing, the Regional Clean Energy Hubs will need to diversify outreach to include market-rate customers and programs available to them. In addition, Hubs outreach will include a larger focus on programs intended to serve multifamily buildings. Regional Clean Energy Hub contracts will be amended to emphasize these changes. Outreach will include attending events where market-rate customers are located, targeted marketing for market-rate customers and providing referrals to these customers. The Regional Clean Energy Hubs are currently coordinating with HCR Weatherization Assistance Program Subgrantees (i.e., service providers). If a Hub needs further assistance connecting with Weatherization Assistance Program representatives or other state agency representatives, they should reach out to their NYSERDA Project Manager for support.

4. Operationalizing program marketing and outreach

Discussion:
Community stakeholders requested clarification on how organizations outside of the Regional Clean Energy Hubs network will be incorporated into outreach efforts, with a particular interest in utility companies where historical distrust may interrupt effective collaboration. They noted NYSERDA marketing and outreach should be clear about what a program can and cannot deliver to customers and further suggested NYSERDA should support and employ different methods of outreach, recognizing that not everyone in DACs has access to online spaces. In addition, they noted leveraging word-of-mouth outreach through community leaders is essential.

Status:
NYSERDA regularly coordinates outreach with utilities via the Regional Clean Energy Hubs for specific programs. NYSERDA's Implementation Plan includes additional outreach coordination with New York State's investor-owned utilities. NYSERDA recognizes the need to improve and diversify program outreach and is focusing attention on identifying feasible options, including leveraging the Regional Clean Energy Hubs. Feedback on the need to support and employ different methods of outreach will be advanced to NYSERDA's Corporate Marketing team. Feedback on the need for marketing and outreach clarity around program parameters will be raised with NYSERDA's Corporate Marketing team for exploratory discussion.

5. Collaboration between the Energy Equity Collaborative and the Regional Clean Energy Hubs

Discussion:
Community stakeholders suggested that improved collaboration between the Energy Equity Collaborative and the Regional Clean Energy Hubs should take into consideration the purpose, objectives, and impact of each of the two initiatives, but expressed uncertainty around how to improve collaboration between the two groups logistically and operationally.

Status:
A discussion on the purpose, objectives, and impact of each group will be included on the agenda of a coordination meeting planned for 2026 to which participants of the Energy Equity Collaborative and the Regional Clean Energy Hubs will be invited. Currently, the Energy Equity Collaborative Steering Committee meetings include Regional Clean Energy Hubs' leadership participation. In addition, NYSERDA is conducting a crosswalk between the Regional Clean Energy Hubs' Regional Assessment and Barriers Analyses Synthesis and the Energy Equity Collaborative Action Plans to identify shared priorities and collaboration opportunities. This crosswalk was be shared during the 2025 Regional Clean Energy Hubs Annual Meeting (October 2025) and will be shared during a subsequent Energy Equity Collaborative Steering Committee meeting (early 2026) to inform strategic planning by both groups.

6. Disadvantaged Community Consultant Pool timing and applicant experience

Discussion:
Community stakeholders requested details about the timing of the NYSERDA Disadvantaged Communities Consultant Pool Request for Qualifications (RFQL 4922) and what efforts have been made to improve applicant experience, expressing concern about missed opportunities. In addition, stakeholder emphasized that community representatives need to be compensated for their time advising NYSERDA.

Status:
The DAC Consultant Pool (referred to previously as the DAC Stakeholder Services Pool) has improved engagement throughout 2025, issuing contracts to the Pool-participating organizations. NYSERDA acknowledges that the initial rollout of the Pool was prohibitively slow. To improve applicant experience, NYSERDA updated program rules at the time of the reissued Request for Qualifications (RFQL 4922) in August 2025. The RFQL no longer requires a proposal-based response and is instead application-based utilizing a click-through online application. This decision was made in response to feedback from community-based organizations who let NYSERDA know the proposal process was onerous. NYSERDA's Energy and Climate Equity team is applying lessons learned about Pool contracting and task work orders, preferences for an

upfront payment and milestone-based payment-based schedules, and other suggestions toward incremental improvement. NYSERDA will continue to compensate representatives of New York State's environmental justice and disadvantaged communities for their experience and input through the NYSERDA DAC Consultant Pool. The Pool will continue on a path toward growth and incremental improvement, being responsive to community partner feedback on how to best do so.

APPENDIX B: PROGRAM ADMINISTRATORS SUMMARY TABLES

Table 18. Portfolio- Level Program Spending Plan by Sector and Year by Program Administrator

		2026	2027	2028	2029	2030	2031	2032	2033	2034	Grand Total
Program Administrator	**Program Budget Forecast**										
1-4 Family Residential Sub-Portfolio		**$64,820,248**	**$87,867,000**	**$88,347,000**	**$88,347,000**	**$88,347,000**	**$27,771,752**	**$-**	**$-**	**$-**	**$445,500,000**
NYSERDA	EmPower+	$64,820,248	$87,867,000	$88,347,000	$88,347,000	$88,347,000	$27,771,752	$-	$-	$-	$445,500,000
Multifamily Residential Sub-Portfolio		**$97,382,629**	**$135,955,013**	**$158,428,633**	**$179,392,085**	**$226,674,209**	**$23,682,813**	**$21,951,135**	**$-**	**$-**	**$843,466,516**
NYSERDA	Housing Agency Partnerships (Direct Injection)	$28,936,755	$21,868,523	$29,118,525	$27,868,526	$24,618,527	$610,574	$578,571	$-	$-	$133,600,000
NYSERDA	Affordable Multifamily Program Upstate (AMP Up)	$2,712	$4,826,248	$12,082,805	$19,984,243	$43,502,307	$17,658,485	$18,343,200	$-	$-	$116,400,000
NYSERDA	Technical Assistance	$1,478,810	$4,532,518	$6,699,710	$9,147,526	$19,898,318	$5,413,754	$3,029,364	$-	$-	$50,200,000
NYSERDA	Affordable New Construction	$-	$1,333,650	$2,068,850	$4,197,250	$8,400,250	$-	$-	$-	$-	$16,000,000
Con Edison - Electric	Affordable Multifamily Energy Efficiency Program	$12,626,246	$16,634,414	$19,627,074	$23,485,668	$28,866,391	$-	$-	$-	$-	$101,239,793
Con Edison - Gas	Affordable Multifamily Energy Efficiency Program	$40,416,748	$61,744,183	$67,340,129	$72,870,419	$78,993,887	$-	$-	$-	$-	$321,365,366
National Grid - KEDLI	Affordable Multifamily Energy Efficiency Program	$1,189,482	$3,989,518	$4,170,860	$4,352,201	$4,505,417	$-	$-	$-	$-	$18,207,477
National Grid - KEDNY	Affordable Multifamily Energy Efficiency Program	$12,731,877	$21,025,959	$17,320,681	$17,486,252	$17,889,112	$-	$-	$-	$-	$86,453,880
General Awareness and Education Sub-Portfolio		**$24,706**	**$3,783,823**	**$13,657,794**	**$16,215,785**	**$18,515,785**	**$102,108**	**$-**	**$-**	**$-**	**$52,300,000**
NYSERDA	DAC Engagement	$24,706	$1,708,823	$11,582,794	$14,140,785	$16,440,785	$102,108	$-	$-	$-	$44,000,000
NYSERDA	General Marketing	$-	$2,075,000	$2,075,000	$2,075,000	$2,075,000	$-	$-	$-	$-	$8,300,000
Workforce Development Sub-Portfolio		**$465,009**	**$2,946,250**	**$5,125,000**	**$7,114,562**	**$7,227,116**	**$4,622,063**	**$2,500,000**	**$-**	**$-**	**$30,000,000**
NYSERDA	Workforce (LMI)	$465,009	$2,946,250	$5,125,000	$7,114,562	$7,227,116	$4,622,063	$2,500,000	$-	$-	$30,000,000
Portfolio Administration		**$18,548,737**	**$25,578,959**	**$28,236,089**	**$30,063,110**	**$30,908,309**	**$16,287,349**	**$10,173,114**	**$-**	**$-**	**$159,795,668**
NYSERDA		$11,460,494	$18,127,401	$20,322,853	$21,658,653	$21,970,136	$16,287,349	$10,173,114	$-	$-	$120,000,000
Con Edison - Electric		$1,453,282	$1,362,999	$1,541,332	$1,769,611	$2,066,990	$-	$-	$-	$-	$8,194,215
Con Edison - Gas		$4,543,947	$4,951,638	$5,187,374	$5,400,935	$5,586,046	$-	$-	$-	$-	$25,669,940
KEDLI		$196,230	$204,475	$213,026	$221,895	$231,097	$-	$-	$-	$-	$1,066,723
KEDNY		$894,784	$932,446	$971,505	$1,012,016	$1,054,039	$-	$-	$-	$-	$4,864,790
Portfolio EM&V		**$220,441**	**$2,393,111**	**$4,669,663**	**$5,022,298**	**$4,151,166**	**$3,745,000**	**$3,200,000**	**$1,380,000**	**$700,000**	**$25,481,680**
NYSERDA		$100,000	$2,080,000	$4,350,000	$4,675,000	$3,770,000	$3,745,000	$3,200,000	$1,380,000	$700,000	$24,000,000
Con Edison - Electric		$11,249	$39,883	$46,168	$53,899	$64,330					$215,528
Con Edison - Gas		$29,192	$158,341	$174,934	$192,031	$211,654					$766,152
KEDLI		$14,400	$16,200	$18,000	$19,800	$21,600					$90,000
KEDNY		$65,600	$98,688	$80,561	$81,568	$83,582					$410,000
Portfolio Cost Recovery Fund		**$1,303,102**	**$1,789,863**	**$2,207,764**	**$2,419,537**	**$2,869,426**	**$925,641**	**$459,404**	**$16,761**	**$8,502**	**$12,000,000**
NYSERDA		$1,303,102	$1,789,863	$2,207,764	$2,419,537	$2,869,426	$925,641	$459,404	$16,761	$8,502	$12,000,000
LMI Portfolio Total		**$182,764,872**	**$260,314,019**	**$300,671,943**	**$328,574,376**	**$378,693,011**	**$77,136,726**	**$38,283,653**	**$1,396,761**	**$708,502**	**$1,568,543,864**

Table 19. Portfolio- Level Program Savings Plan by Sector and Year by Program Administrator

		2026	2027	2028	2029	2030	2031	2032	2033	2034	Grand Total
Program Administrator	**Lifetime MMBtu-e Energy Savings**										
1-4 Family Residential Sub-Portfolio		**5,814,118**	**4,978,993**	**4,978,993**	**4,978,993**	**4,978,993**	**1,244,899**	**-**	**-**	**-**	**26,974,990**
NYSERDA	EmPower+	5,814,118	4,978,993	4,978,993	4,978,993	4,978,993	1,244,899	-	-	-	26,974,990
Multifamily Residential Sub-Portfolio		**15,138,715**	**17,483,912**	**19,380,167**	**22,035,294**	**30,448,738**	**8,703,026**	**3,856,221**	**-**	**-**	**117,046,072**
NYSERDA	Housing Agency Partnerships (Direct Injection)	-	603,014	1,300,335	1,533,219	2,205,745	2,085,105	637,425	-	-	8,364,842
NYSERDA	Affordable Multifamily Program Upstate (AMP Up)	-	300,882	807,934	1,364,451	2,692,940	1,484,701	1,253,211	-	-	7,904,119
NYSERDA	Technical Assistance	450,024	2,792,741	3,497,314	4,247,097	8,069,190	2,669,966	1,691,730	-	-	23,418,061
NYSERDA	Affordable New Construction	-	-	-	456,399	2,282,257	2,463,254	273,855	-	-	5,475,765
Con Edison - Electric	Affordable Multifamily Energy Efficiency Program	3,548,105	1,932,709	2,085,020	2,243,781	2,447,467	-	-	-	-	12,257,084
Con Edison - Gas	Affordable Multifamily Energy Efficiency Program	9,241,535	9,368,662	9,901,733	10,371,875	10,885,862	-	-	-	-	49,769,667
National Grid - KEDLI	Affordable Multifamily Energy Efficiency Program	68,271	331,243	287,870	301,812	315,777	-	-	-	-	1,304,973
National Grid - KEDNY	Affordable Multifamily Energy Efficiency Program	1,830,780	2,154,660	1,499,960	1,516,660	1,549,500	-	-	-	-	8,551,560
General Awareness and Education Sub-Portfolio		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
NYSERDA	DAC Engagement	-	-	-	-	-	-	-	-	-	-
NYSERDA	General Marketing	-	-	-	-	-	-	-	-	-	-
Total LMI Portfolio Lifetime Direct Energy Savings (MMBtu-e)		**20,952,833**	**22,462,905**	**24,359,160**	**27,014,287**	**35,427,731**	**9,947,925**	**3,856,221**	**-**	**-**	**144,021,063**

Table 20. Portfolio- Level Program Participants (Dwelling Units) Plan by Sector and Year by Program Administrator

		2026	2027	2028	2029	2030	2031	2032	2033	2034	Grand Total
Program Administrator	**Participants (Dwelling Units)**										
1-4 Family Residential Sub-Portfolio		**6,907**	**9,204**	**9,204**	**9,204**	**9,204**	**2,300**	**0**	**0**	**0**	**46,023**
NYSERDA	EmPower+	6,907	9,204	9,204	9,204	9,204	2,300	-	-	-	46,023
Multifamily Residential Sub-Portfolio		**144,667**	**175,989**	**192,141**	**207,590**	**244,278**	**37,272**	**20,297**	**-**	**-**	**1,022,234**
NYSERDA	Housing Agency Partnerships (Direct Injection)	-	625	1,348	1,589	2,286	2,161	661	-	-	8,670
NYSERDA	Affordable Multifamily Program Upstate (AMP Up)	-	912	2,448	4,134	8,159	4,499	3,797	-	-	23,949
NYSERDA	Technical Assistance	4,018	27,401	33,028	39,005	60,146	30,612	15,839	-	-	210,049
NYSERDA	Affordable New Construction	-	1,400	4,375	1,725	-	-	-	-	-	7,500
Con Edison - Electric	Affordable Multifamily Energy Efficiency Program	35,097	24,887	27,834	31,397	36,206	`	-	-	-	155,421
Con Edison - Gas	Affordable Multifamily Energy Efficiency Program	91,079	98,805	105,468	111,860	119,121	-	-	-	-	526,333
National Grid - KEDLI	Affordable Multifamily Energy Efficiency Program	168	1,380	1,440	1,440	1,500	-	-	-	-	5,928
National Grid - KEDNY	Affordable Multifamily Energy Efficiency Program	14,304	20,580	16,200	16,440	16,860	-	-	-	-	84,384
General Awareness and Education Sub-Portfolio *		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
NYSERDA	DAC Engagement	-	-	-	-	-	-	-	-	-	-
NYSERDA	General Marketing	-	-	-	-	-	-	-	-	-	-
Total LMI Portfolio Participants (Dwelling Units)		**151,574**	**185,193**	**201,345**	**216,794**	**253,482**	**39,572**	**20,297**	**-**	**-**	**1,068,257**

Table 21: Portfolio- Level Program Participants (Buildings) Plan by Sector and Year by Program Administrator

Program Administrator	Participants (Buildings)	2026	2027	2028	2029	2030	2031	2032	2033	2034	Grand Total
1-4 Family Residential Sub-Portfolio		**-**	**-**	**-**	**-**	**-**	**-**	**0**	**0**	**0**	**0**
NYSERDA	EmPower+	-	-	-	-	-	-	-	-	-	-
Multifamily Residential Sub-Portfolio		**2,268**	**2,605**	**2,893**	**3,241**	**4,401**	**847**	**469**	**-**	**-**	**16,723**
NYSERDA	Housing Agency Partnerships (Direct Injection)	-	13	27	31	46	44	13	-	-	174
NYSERDA	Affordable Multifamily Program Upstate (AMP Up)	-	70	188	318	627	346	292	-	-	1,841
NYSERDA	Technical Assistance	47	562	650	746	1,430	457	164	-	-	4,056
NYSERDA	Affordable New Construction	-	8	25	12	-	-	-	-	-	45
Con Edison - Electric	Affordable Multifamily Energy Efficiency Program	450	319	357	403	464	-	-	-	-	1,993
Con Edison - Gas	Affordable Multifamily Energy Efficiency Program	1,168	1,267	1,352	1,434	1,527	-	-	-	-	6,748
National Grid - KEDLI	Affordable Multifamily Energy Efficiency Program	7	23	24	24	25	-	-	-	-	103
National Grid - KEDNY	Affordable Multifamily Energy Efficiency Program	596	343	270	274	281	-	-	-	-	1,764
General Awareness and Education Sub-Portfolio *		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
NYSERDA	DAC Engagement	-	-	-	-	-	-	-	-	-	-
NYSERDA	General Marketing	-	-	-	-	-	-	-	-	-	-
Total LMI Portfolio Participants (Buildings)		**2,268**	**2,605**	**2,893**	**3,241**	**4,401**	**847**	**469**	**-**	**-**	**16,723**

Table 22. NYSERDA Portfolio- Level Spending Planned by Budget Category and Year ($)

NYSERDA Spending	Incentives & Services	Tools, Training & Replication	Implementation	Marketing	Labor	Non-Labor Administration	EM&V	CRF	Total
2026	90,087,624	2,296,811	3,164,115	179,689	9,359,908	2,100,586	100,000	1,303,102	108,591,835
2027	107,204,982	5,960,055	11,365,720	2,627,255	14,948,810	3,178,591	2,080,000	1,789,863	149,155,276
2028	135,431,467	6,027,036	12,970,118	2,671,063	16,711,831	3,611,022	4,350,000	2,207,764	183,980,301
2029	151,024,221	4,811,325	14,320,145	2,719,201	17,999,857	3,658,796	4,675,000	2,419,537	201,628,081
2030	185,608,188	4,525,321	17,646,606	2,729,188	18,551,770	3,418,366	3,770,000	2,869,426	239,118,865
2031	42,581,456	2,170,978	11,206,427	219,876	13,949,869	2,337,480	3,745,000	925,641	77,136,726
2032	21,507,150	478,965	2,415,020	50,000	9,194,201	978,913	3,200,000	459,404	38,283,653
2033	0	0	0	0	0	0	1,380,000	16,761	1,396,761
2034	0	0	0	0	0	0	700,000	8,502	708,502
Total	**733,445,087**	**26,270,490**	**73,088,152**	**11,196,272**	**100,716,246**	**19,283,754**	**24,000,000**	**12,000,000**	**1,000,000,000**

Table 23. Con Edison Portfolio- Level Spending Planned by Budget Category and Year

Con Edison Spending	Incentives & Services	Tools, Training & Replication	Implementation	Marketing	Labor	Non-Labor Administration	EM&V	CRF	Total
Electric	**$ 92,465,423**	**$ -**	**$ 7,727,053**	**$ 1,047,316**	**$ 6,792,946**	**$ 1,401,269**	**$ 215,528**	**$ -**	**$ 109,649,536**
2026	$ 10,315,403	$ -	$ 2,181,699	$ 129,143	$ 1,207,974	$ 245,309	$ 11,249	$ -	$ 14,090,777
2027	$ 15,361,410	$ -	$ 1,079,917	$ 193,087	$ 1,132,566	$ 230,434	$ 39,883	$ -	$ 18,037,296
2028	$ 18,162,747	$ -	$ 1,250,836	$ 213,491	$ 1,278,171	$ 263,161	$ 46,168	$ -	$ 21,214,573
2029	$ 21,783,687	$ -	$ 1,462,754	$ 239,226	$ 1,465,601	$ 304,010	$ 53,899	$ -	$ 25,309,177
2030	$ 26,842,176	$ -	$ 1,751,847	$ 272,369	$ 1,708,634	$ 358,356	$ 64,330	$ -	$ 30,997,712
Gas	**$ 284,266,421**	**$ -**	**$ 33,059,274**	**$ 4,039,672**	**$ 21,060,136**	**$ 4,609,804**	**$ 766,152**	**$ -**	**$ 347,801,458**
2026	$ 33,083,920	$ -	$ 6,919,472	$ 413,357	$ 3,874,255	$ 669,692	$ 29,192	$ -	$ 44,989,888
2027	$ 55,211,726	$ -	$ 5,671,169	$ 861,288	$ 4,070,648	$ 880,990	$ 158,341	$ -	$ 66,854,162
2028	$ 60,220,446	$ -	$ 6,226,080	$ 893,602	$ 4,237,908	$ 949,466	$ 174,934	$ -	$ 72,702,436
2029	$ 65,149,197	$ -	$ 6,798,001	$ 923,222	$ 4,383,222	$ 1,017,714	$ 192,031	$ -	$ 78,463,385
2030	$ 70,601,132	$ -	$ 7,444,553	$ 948,202	$ 4,494,103	$ 1,091,943	$ 211,654	$ -	$ 84,791,586
Grand Total	**$ 376,731,844**	**$ -**	**$ 40,786,327**	**$ 5,086,988**	**$ 27,853,082**	**$ 6,011,073**	**$ 981,680**	**$ -**	**$ 457,450,994**

Table 24. KEDLI Portfolio- Level Spending Planned by Budget Category and Year

KEDLI Spending	Incentives & Services	Tools, Training & Replication	Implementation	Marketing	Labor	Non-Labor Administration	EM&V	CRF	Total
2026	$ 929,482	$ -	$ 215,000	$ 45,000	$ 178,003	$ 18,227	$ 14,400	$ -	$ 1,400,112
2027	$ 3,408,099	$ -	$ 519,543	$ 61,875	$ 185,123	$ 19,352	$ 16,200	$ -	$ 4,210,193
2028	$ 3,563,013	$ -	$ 543,159	$ 64,688	$ 192,528	$ 20,498	$ 18,000	$ -	$ 4,401,886
2029	$ 3,717,926	$ -	$ 566,775	$ 67,500	$ 200,229	$ 21,666	$ 19,800	$ -	$ 4,593,896
2030	$ 3,872,840	$ -	$ 590,390	$ 42,187	$ 208,238	$ 22,859	$ 21,600	$ -	$ 4,758,114
Grand Total	**$ 15,491,360**	**$ -**	**$ 2,434,867**	**$ 281,250**	**$ 964,121**	**$ 102,602**	**$ 90,000**	**$ -**	**$ 19,364,200**

Table 25. KEDNY Portfolio- Level Spending Planned by Budget Category and Year

KEDNY Spending	Incentives & Services	Tools, Training & Replication	Implementation	Marketing	Labor	Non-Labor Administration	EM&V	CRF	Total
2026	$ 10,640,526	$ -	$ 2,056,351	$ 35,000	$ 806,440	$ 88,344	$ 65,600	$ -	$ 13,692,261
2027	$ 17,578,819	$ -	$ 3,393,546	$ 53,594	$ 838,698	$ 93,748	$ 98,688	$ -	$ 22,057,093
2028	$ 14,676,587	$ -	$ 2,600,343	$ 43,750	$ 872,246	$ 99,259	$ 80,561	$ -	$ 18,372,747
2029	$ 14,860,045	$ -	$ 2,581,910	$ 44,297	$ 907,136	$ 104,880	$ 81,568	$ -	$ 18,579,836
2030	$ 15,226,959	$ -	$ 2,620,044	$ 42,109	$ 943,421	$ 110,618	$ 83,582	$ -	$ 19,026,733
Grand Total	**$ 72,982,936**	**$ -**	**$ 13,252,194**	**$ 218,750**	**$ 4,367,941**	**$ 496,849**	**$ 410,000**	**$ -**	**$ 91,728,670**

Table 26: Downstate Portfolio- Level Spending Planned by Budget Category and Year

Downstate Utility Total Spending	Incentives & Services	Tools, Training & Replication	Implementation	Marketing	Labor	Non-Labor Administration	EM&V	CRF	Total
2026	$ 54,969,330	$ -	$ 11,372,522	$ 622,500	$ 6,066,671	$ 1,021,572	$ 120,441	$ -	$ 74,173,037
2027	$ 91,560,055	$ -	$ 10,664,175	$ 1,169,844	$ 6,227,035	$ 1,224,524	$ 313,111	$ -	$ 111,158,744
2028	$ 96,622,793	$ -	$ 10,620,418	$ 1,215,532	$ 6,580,853	$ 1,332,383	$ 319,663	$ -	$ 116,691,642
2029	$ 105,510,855	$ -	$ 11,409,440	$ 1,274,245	$ 6,956,188	$ 1,448,269	$ 347,298	$ -	$ 126,946,295
2030	$ 116,543,107	$ -	$ 12,406,834	$ 1,304,867	$ 7,354,397	$ 1,583,776	$ 381,166	$ -	$ 139,574,146
Grand Total	**$ 465,206,140**	**$ -**	**$ 56,473,388**	**$ 5,586,988**	**$ 33,185,144**	**$ 6,610,524**	**$ 1,481,680**	**$ -**	**$ 568,543,864**

APPENDIX C: PROGRAM ADMINISTRATORS DETAILED BUDGET AND BENEFITS TABLES

This appendix contains tables with program-level breakdowns of budget and benefits plans by year, including details for budget categories, non-program cost considerations, and annual and lifetime energy savings by type. NYSERDA program tables contain allocations of broader non-program costs (Admin, EM&V, etc.) to each program across the portfolio. Workforce program tables are found in NYSERDA's Workforce Implementation Plan.

Table 27: NYSERDA 1 -4 Family Residential EmPower+ (Low Income) Budget and Benefit Breakdown

NYSERDA 1-4 Family Residential EmPower+ - Low Income	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**58,338**	**77,784**	**77,784**	**77,784**	**77,784**	**19,446**	**0**	**0**	**0**	**388,922**
Incentives & Services	53,942	66,174	66,209	67,453	68,361	17,094	0	0	0	339,232
Implementation	2,638	7,616	7,620	7,763	7,868	1,967	0	0	0	35,474
Marketing	144	444	444	452	458	115	0	0	0	2,057
Tools, Training & Replication	1,614	3,551	3,512	2,115	1,097	270	0	0	0	12,159
Non-Program Budget Plan ($ 000s)	**5,928**	**10,137**	**12,387**	**13,250**	**13,183**	**9,658**	**6,374**	**644**	**326**	**71,886**
Admin - Labor	4,313	6,889	7,701	8,294	8,549	6,428	4,237	0	0	46,411
Admin - Non-Labor	968	1,465	1,664	1,686	1,575	1,077	451	0	0	8,886
EM&V	46	958	2,005	2,154	1,737	1,726	1,475	636	323	11,059
Cost Recovery	600	825	1,017	1,115	1,322	427	212	8	4	5,530
Annual MMBtu-e Energy Savings (000s)	**179**	**151**	**151**	**151**	**151**	**38**	**0**	**0**	**0**	**820**
Annual MWh Savings	2	1	1	1	1	0	0	0	0	5
Annual MMBtu Savings	172	149	149	149	149	37	0	0	0	804
Lifetime MMBtu-e Energy Savings (000s)	**4,950**	**4,157**	**4,157**	**4,157**	**4,157**	**1,039**	**0**	**0**	**0**	**22,619**
Lifetime MWh Savings	57	16	16	16	16	4	0	0	0	126
Lifetime MMBtu Savings	4,757	4,102	4,102	4,102	4,102	1,026	0	0	0	22,190
Participants (Dwelling Units)	**5,788**	**7,712**	**7,712**	**7,712**	**7,712**	**1,928**	**0**	**0**	**0**	**38,564**
Effective Useful Life: 27.6 years (gas) | 27.6 years (electric)										

Table 28: NYSERDA 1 -4 Family Residential EmPower+ (Moderate Income) Budget and Benefit Breakdown

NYSERDA 1-4 Family Residential EmPower+ - Moderate Income	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**6,482**	**8,643**	**8,643**	**8,643**	**8,643**	**2,161**	**0**	**0**	**0**	**43,213**
Incentives & Services	5,919	7,395	7,395	7,395	7,641	1,910	0	0	0	37,655
Implementation	303	851	851	851	879	220	0	0	0	3,955
Marketing	19	50	50	50	51	13	0	0	0	232
Tools, Training & Replication	241	347	347	347	71	18	0	0	0	1,372
Non-Program Budget Plan ($ 000s)	**659**	**1,126**	**1,376**	**1,472**	**1,465**	**1,073**	**708**	**72**	**36**	**7,987**
Admin - Labor	479	765	856	922	950	714	471	0	0	5,157
Admin - Non-Labor	108	163	185	187	175	120	50	0	0	987
EM&V	5	106	223	239	193	192	164	71	36	1,229
Cost Recovery	67	92	113	124	147	47	24	1	0	614
Annual MMBtu-e Energy Savings (000s)	**30**	**29**	**29**	**29**	**29**	**7**	**0**	**0**	**0**	**151**
Annual MWh Savings	0	0	0	0	0	0	0	0	0	1
Annual MMBtu Savings	29	28	28	28	28	7	0	0	0	149
Lifetime MMBtu-e Energy Savings (000s)	**864**	**822**	**822**	**822**	**822**	**205**	**0**	**0**	**0**	**4,356**
Lifetime MWh Savings	8	3	3	3	3	1	0	0	0	20
Lifetime MMBtu Savings	836	812	812	812	812	203	0	0	0	4,288
Participants (Dwelling Units)	**1,119**	**1,492**	**1,492**	**1,492**	**1,492**	**372**	**0**	**0**	**0**	**7,459**
Effective Useful Life: 28.8 years (gas) | 28.8 years (electric)										

Table 29: NYSERDA 1 -4 Family Residential EmPower+ (Utility Referral Funding Breakdown) Budget and Benefit Breakdown

NYSERDA 1-4 Family Residential EmPower+ - Utility Referral Funding	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**0**	**1,440**	**1,920**	**1,920**	**1,920**	**6,165**	**0**	**0**	**0**	**13,365**
Incentives & Services	0	0	0	0	0	0	0	0	0	0
Implementation	0	1,440	1,920	1,920	1,920	6,165	0	0	0	13,365
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**204**	**348**	**426**	**455**	**453**	**332**	**219**	**22**	**11**	**2,470**
Admin - Labor	148	237	265	285	294	221	146	0	0	1,595
Admin - Non-Labor	33	50	57	58	54	37	16	0	0	305
EM&V	2	33	69	74	60	59	51	22	11	380
Cost Recovery	21	28	35	38	45	15	7	0	0	190

Table 30: NYSERDA Multifamily Residential Housing Agency Partnerships (Direct Injection) Budget and Benefit Breakdown

NYSERDA Multifamily Residential Housing Agency Partnerships (Direct Injection)	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**28,937**	**21,869**	**29,119**	**27,869**	**24,619**	**611**	**579**	**0**	**0**	**133,600**
Incentives & Services	28,937	21,869	29,119	27,869	24,619	611	579	0	0	133,600
Implementation	0	0	0	0	0	0	0	0	0	0
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**2,036**	**3,482**	**4,255**	**4,551**	**4,529**	**3,318**	**2,190**	**221**	**112**	**24,694**
Admin - Labor	1,482	2,366	2,645	2,849	2,937	2,208	1,455	0	0	15,943
Admin - Non-Labor	333	503	572	579	541	370	155	0	0	3,052
EM&V	16	329	689	740	597	593	507	218	111	3,799
Cost Recovery	206	283	349	383	454	147	73	3	1	1,900
Annual MMBtu-e Energy Savings (000s)	**0**	**30**	**65**	**77**	**110**	**104**	**32**	**0**	**0**	**418**
Annual MWh Savings	0	0	0	0	0	0	0	0	0	1
Annual MMBtu Savings	0	30	64	76	109	103	32	0	0	414
Lifetime MMBtu-e Energy Savings (000s)	**0**	**603**	**1,300**	**1,533**	**2,206**	**2,085**	**637**	**0**	**0**	**8,365**
Lifetime MWh Savings	0	2	4	4	6	6	2	0	0	23
Lifetime MMBtu Savings	0	597	1,288	1,519	2,185	2,066	631	0	0	8,286
Participants (Dwelling Units)	**0**	**625**	**1,348**	**1,589**	**2,286**	**2,161**	**661**	**0**	**0**	**8,670**
Participants (Buildings)	**0**	**13**	**27**	**31**	**46**	**44**	**13**	**0**	**0**	**174**
Effective Useful Life: 20 years (gas) | 20 years (electric)										

Table 31: NYSERDA Multifamily Residential Affordable Multifamily Program Upstate (AMP Up) Budget and Benefit Breakdown

NYSERDA Multifamily Residential Affordable Multifamily Program Upstate (AMP Up)	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**3**	**4,826**	**12,083**	**19,984**	**43,502**	**17,658**	**18,343**	**0**	**0**	**116,400**
Incentives & Services	0	3,877	10,409	17,580	38,281	15,544	16,146	0	0	101,836
Implementation	0	434	1,121	1,871	4,074	1,654	1,718	0	0	10,871
Marketing	3	0	0	0	0	0	0	0	0	3
Tools, Training & Replication	0	516	553	534	1,148	461	479	0	0	3,690
Non-Program Budget Plan ($ 000s)	**1,774**	**3,034**	**3,707**	**3,965**	**3,946**	**2,890**	**1,908**	**193**	**98**	**21,515**
Admin - Labor	1,291	2,062	2,305	2,482	2,559	1,924	1,268	0	0	13,890
Admin - Non-Labor	290	438	498	505	471	322	135	0	0	2,660
EM&V	14	287	600	645	520	516	441	190	97	3,310
Cost Recovery	180	247	304	334	396	128	63	2	1	1,655
Annual MMBtu-e Energy Savings (000s)	**0**	**19**	**50**	**85**	**168**	**93**	**78**	**0**	**0**	**494**
Annual MWh Savings	0	0	1	1	2	1	1	0	0	7
Annual MMBtu Savings	0	18	48	81	160	88	74	0	0	469
Lifetime MMBtu-e Energy Savings (000s)	**0**	**301**	**808**	**1,364**	**2,693**	**1,485**	**1,253**	**0**	**0**	**7,904**
Lifetime MWh Savings	0	4	12	20	39	22	18	0	0	116
Lifetime MMBtu Savings	0	286	768	1,296	2,558	1,410	1,191	0	0	7,509
Participants (Dwelling Units)	**0**	**912**	**2,448**	**4,134**	**8,159**	**4,499**	**3,797**	**0**	**0**	**23,949**
Participants (Buildings)	**0**	**70**	**188**	**318**	**627**	**346**	**292**	**0**	**0**	**1,841**
Effective Useful Life: 16 years (gas) | 16 years (electric)										

Table 32: NYSERDA Multifamily Residential Technical Assistance Budget and Benefit Breakdown

NYSERDA Multifamily Residential Technical Assistance	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**1,479**	**4,533**	**6,700**	**9,148**	**19,898**	**5,414**	**3,029**	**0**	**0**	**50,200**
Incentives & Services	848	2,567	4,507	6,687	16,458	3,231	2,570	0	0	36,867
Implementation	184	544	771	1,039	2,019	761	460	0	0	5,778
Marketing	6	0	0	0	0	0	0	0	0	6
Tools, Training & Replication	442	1,422	1,422	1,422	1,422	1,422	0	0	0	7,550
Non-Program Budget Plan ($ 000s)	**765**	**1,308**	**1,599**	**1,710**	**1,702**	**1,247**	**823**	**83**	**42**	**9,279**
Admin - Labor	557	889	994	1,071	1,103	830	547	0	0	5,990
Admin - Non-Labor	125	189	215	218	203	139	58	0	0	1,147
EM&V	6	124	259	278	224	223	190	82	42	1,427
Cost Recovery	78	106	131	144	171	55	27	1	1	714
Annual MMBtu-e Energy Savings (000s)	**30**	**177**	**224**	**274**	**528**	**169**	**113**	**0**	**0**	**1,514**
Annual MWh Savings	0	2	3	4	8	2	2	0	0	21
Annual MMBtu Savings	28	169	213	261	503	161	107	0	0	1,443
Lifetime MMBtu-e Energy Savings (000s)	**450**	**2,793**	**3,497**	**4,247**	**8,069**	**2,670**	**1,692**	**0**	**0**	**23,418**
Lifetime MWh Savings	7	35	45	56	114	33	25	0	0	315
Lifetime MMBtu Savings	427	2,674	3,343	4,054	7,682	2,558	1,606	0	0	22,344
Participants (Dwelling Units)	**4,018**	**27,401**	**33,028**	**39,005**	**60,146**	**30,612**	**15,839**	**0**	**0**	**210,049**
Participants (Buildings)	**47**	**562**	**650**	**746**	**1,430**	**457**	**164**	**0**	**0**	**4,056**
Weighted Effective Useful Life: 15.5 years (gas) | 15.1 years (elec)										

Table 33: NYSERDA Multifamily Residential Affordable New Construction Budget and Benefit Breakdown

NYSERDA Multifamily Residential Affordable New Construction	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**0**	**1,334**	**2,069**	**4,197**	**8,400**	**0**	**0**	**0**	**0**	**16,000**
Incentives & Services	0	1,209	1,875	3,804	7,613	0	0	0	0	14,500
Implementation	0	0	0	0	0	0	0	0	0	0
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	125	194	393	788	0	0	0	0	1,500
Non-Program Budget Plan ($ 000s)	**244**	**417**	**510**	**545**	**542**	**397**	**262**	**26**	**13**	**2,957**
Admin - Labor	177	283	317	341	352	264	174	0	0	1,909
Admin - Non-Labor	40	60	68	69	65	44	19	0	0	366
EM&V	2	39	82	89	71	71	61	26	13	455
Cost Recovery	25	34	42	46	54	18	9	0	0	227
Annual MMBtu-e Energy Savings (000s)	**0**	**0**	**0**	**30**	**152**	**164**	**18**	**0**	**0**	**365**
Annual MWh Savings	0	0	0	3	17	18	2	0	0	40
Annual MMBtu Savings	0	0	0	19	95	103	11	0	0	229
Lifetime MMBtu-e Energy Savings (000s)	**0**	**0**	**0**	**456**	**2,282**	**2,463**	**274**	**0**	**0**	**5,476**
Lifetime MWh Savings	0	0	0	50	250	270	30	0	0	600
Lifetime MMBtu Savings	0	0	0	286	1,429	1,542	171	0	0	3,429
Participants (Dwelling Units)	**0**	**1,400**	**4,375**	**1,725**	**0**	**0**	**0**	**0**	**0**	**7,500**
Participants (Buildings)	**0**	**8**	**25**	**12**	**0**	**0**	**0**	**0**	**0**	**45**
Effective Useful Life: 15 years (gas) | 15 years (electric)										

Table 34: NYSERDA Awareness & Engagement (DAC Engagement, Regional Clean Energy Hubs) Budget Breakdown

NYSERDA Awareness & Engagement DAC Engagement: Regional Clean Energy Hubs	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**0**	**1,450**	**11,150**	**13,650**	**15,950**	**0**	**0**	**0**	**0**	**42,200**
Incentives & Services	0	1,450	11,150	13,650	15,950	0	0	0	0	42,200
Implementation	0	0	0	0	0	0	0	0	0	0
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**643**	**1,100**	**1,344**	**1,438**	**1,430**	**1,048**	**692**	**70**	**35**	**7,800**
Admin - Labor	468	747	836	900	928	697	460	0	0	5,036
Admin - Non-Labor	105	159	181	183	171	117	49	0	0	964
EM&V	5	104	217	234	188	187	160	69	35	1,200
Cost Recovery	65	89	110	121	143	46	23	1	0	600

Table 35: NYSERDA Awareness & Engagement (DAC Engagement, Energy Equity Collaborative) Budget Breakdown

NYSERDA Awareness & Engagement DAC Engagement: Energy Equity Collaborative	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**0**	**200**	**200**	**200**	**200**	**0**	**0**	**0**	**0**	**800**
Incentives & Services	0	0	0	0	0	0	0	0	0	0
Implementation	0	200	200	200	200	0	0	0	0	800
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**12**	**21**	**25**	**27**	**27**	**20**	**13**	**1**	**1**	**148**
Admin - Labor	9	14	16	17	18	13	9	0	0	95
Admin - Non-Labor	2	3	3	3	3	2	1	0	0	18
EM&V	0	2	4	4	4	4	3	1	1	23
Cost Recovery	1	2	2	2	3	1	0	0	0	11

Table 36: NYSERDA Awareness & Engagement (DAC Engagement, Disadvantaged Community Consultant Pool) Budget Breakdown

NYSERDA Awareness & Engagement DAC Engagement: Disadvantaged Community Consultant Pool	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**25**	**59**	**233**	**291**	**291**	**102**	**0**	**0**	**0**	**1,000**
Incentives & Services	25	59	233	291	291	102	0	0	0	1,000
Implementation	0	0	0	0	0	0	0	0	0	0
Marketing	0	0	0	0	0	0	0	0	0	0
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**15**	**26**	**32**	**34**	**34**	**25**	**16**	**2**	**1**	**185**
Admin - Labor	11	18	20	21	22	17	11	0	0	119
Admin - Non-Labor	2	4	4	4	4	3	1	0	0	23
EM&V	0	2	5	6	4	4	4	2	1	28
Cost Recovery	2	2	3	3	3	1	1	0	0	14

Table 37: NYSERDA Awareness & Engagement (General Marketing) Budget Breakdown

NYSERDA Awareness & Engagement General Marketing	2026	2027	2028	2029	2030	2031	2032	2033	2034	Total
Program Budget Plan ($ 000s)	**0**	**2,075**	**2,075**	**2,075**	**2,075**	**0**	**0**	**0**	**0**	**8,300**
Incentives & Services	0	0	0	0	0	0	0	0	0	0
Implementation	0	0	0	0	0	0	0	0	0	0
Marketing	0	2,075	2,075	2,075	2,075	0	0	0	0	8,300
Tools, Training & Replication	0	0	0	0	0	0	0	0	0	0
Non-Program Budget Plan ($ 000s)	**127**	**216**	**264**	**283**	**281**	**206**	**136**	**14**	**7**	**1,534**
Admin - Labor	92	147	164	177	182	137	90	0	0	990
Admin - Non-Labor	21	31	36	36	34	23	10	0	0	190
EM&V	1	20	43	46	37	37	31	14	7	236
Cost Recovery	13	18	22	24	28	9	5	0	0	118

Table 38: Weighted Measure Life by Year for Downstate Utilities

Weighted Measure Life by Utility		2026	2027	2028	2029	2030
Con Edison	Electric EUL	32.9	30.2	29.4	28.5	27.3
	Gas EUL	26.9	25.6	25.4	25.3	25.0
KEDLI	Electric EUL	N/A	N/A	N/A	N/A	N/A
	Gas EUL	24.9	25.5	25.3	25.9	26.5
KEDNY	Electric EUL	N/A	N/A	N/A	N/A	N/A
	Gas EUL	20.0	20.0	20.0	20.0	20.0
Utility Total Weighted Measure Life	**Electric EUL**	**32.9**	**30.2**	**29.4**	**28.5**	**27.3**
	Gas EUL	**25.4**	**24.3**	**24.6**	**24.5**	**24.3**

Table 39: Sum of Utility Incentives and Services Budget

Sum of Incentives & Services Budget		Year					
Sub-Program	**PA**	**2026**	**2027**	**2028**	**2029**	**2030**	**Grand Total**
Electrification	Con Edison	-	$1,139,468	$1,777,570	$2,773,009	$4,325,895	$10,015,942
Electrification Total		**-**	**$1,139,468**	**$1,777,570**	**$2,773,009**	**$4,325,895**	**$10,015,942**
Other EE	Con Edison	$7,122,020	$13,555,669	$16,027,726	$19,195,747	$23,433,562	$79,334,725
	KEDLI	$76,729	$581,831	$596,962	$637,527	$678,091	$2,571,141
	KEDNY	$557,341	$2,385,051	$2,815,610	$2,836,555	$2,874,928	$11,469,485
Other EE Total		**$7,756,091**	**$16,522,552**	**$19,440,298**	**$22,669,829**	**$26,986,581**	**$93,375,351**
Weatherization	Con Edison	$36,277,303	$55,877,999	$60,577,897	$64,964,127	$69,683,851	$287,381,177
	KEDLI	$852,752	$2,826,268	$2,966,051	$3,080,399	$3,194,749	$12,920,219
	KEDNY	$10,083,184	$15,193,768	$11,860,977	$12,023,490	$12,352,032	$61,513,451
Weatherization Total		**$47,213,239**	**$73,898,035**	**$75,404,925**	**$80,068,017**	**$85,230,631**	**$361,814,847**
Grand Total		**$54,969,330**	**$91,560,055**	**$96,622,793**	**$105,510,855**	**$116,543,107**	**$465,206,140**

Table 40: Utility Direct Savings Targets (LMMBtu-e)

Sum of Direct Savings Target (LMMBtu-e)		Year					
Sub-Program	**PA**	**2026**	**2027**	**2028**	**2029**	**2030**	**Grand Total**
Electrification	Con Edison	-	29,313	43,970	65,955	98,932	238,170
Electrification Total		**-**	**29,313**	**43,970**	**65,955**	**98,932**	**238,170**
	Con Edison	1,937,325	2,601,260	2,857,616	3,166,305	3,541,966	14,104,471
	KEDLI	14,123	42,544	63,947	68,428	72,912	261,955
Other EE	KEDNY	334,440	661,120	651,640	656,760	666,220	2,970,180
Other EE Total		**2,285,888**	**3,304,924**	**3,573,202**	**3,891,493**	**4,281,098**	**17,336,606**
	Con Edison	10,852,316	8,670,798	9,085,168	9,383,397	9,692,431	47,684,110
	KEDLI	54,148	288,699	223,924	233,384	242,864	1,043,018
Weatherization	KEDNY	1,496,340	1,493,540	848,320	859,900	883,280	5,581,380
Weatherization Total		**12,402,803**	**10,453,037**	**10,157,412**	**10,476,681**	**10,818,575**	**54,308,508**
Grand Total		**14,688,691**	**13,787,275**	**13,774,584**	**14,434,128**	**15,198,606**	**71,883,284**

National Grid has increased its lifetime program targets from the PSC Authorized LMI Portfolio Savings Target for 2026-2030 in KEDNY. National Grid expects to attain greater than the originally projected savings because of increased uptake of Strategic building envelope measures with longer Effective Useful Life (EUL) than other gas energy efficiency offerings.

Table 41: Utility Direct Lifetime MWh Savings by Program

	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential	**1,039,890**	**566,445**	**611,085**	**657,615**	**717,312**	**3,592,346**
Con Edison	1,039,890	566,445	611,085	657,615	717,312	3,592,346
KEDLI	-	-	-	-	-	-
KEDNY	-	-	-	-	-	-

Table 42: Utility Direct Lifetime MMBtu Gas Savings by Program

	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential	**11,140,586**	**11,854,565**	**11,689,563**	**12,190,347**	**12,751,139**	**59,626,200**
Con Edison	9,241,535	9,368,662	9,901,733	10,371,875	10,885,862	49,769,667
KEDLI	68,271	331,243	287,870	301,812	315,777	1,304,973
KEDNY	1,830,780	2,154,660	1,499,960	1,516,660	1,549,500	8,551,560

Table 43: Utility Direct Annual MMBtu-e Savings by Program

	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential	**546,098**	**551,408**	**546,256**	**577,050**	**613,920**	**2,834,731**
Con Edison	451,813	430,672	459,886	489,584	524,551	2,356,505
KEDLI	2,746	13,003	11,372	11,633	11,894	50,648
KEDNY	91,539	107,733	74,998	75,833	77,475	427,578

Table 44: Utility Direct Annual MWh Savings by Program

	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential	**31,571**	**18,756**	**20,752**	**23,103**	**26,263**	**120,445**
Con Edison	31,571	18,756	20,752	23,103	26,263	120,445
KEDLI	-	-	-	-	-	-
KEDNY	-	-	-	-	-	-

Table 45: Utility Direct Annual MMBtu Gas Savings by Program

	2026	2027	2028	2029	2030	Grand Total
Multifamily Residential	**438,378**	**487,414**	**475,451**	**498,222**	**524,309**	**2,423,774**
Con Edison	344,092	366,678	389,081	410,756	434,940	1,945,547
KEDLI	2,746	13,003	11,372	11,633	11,894	50,648
KEDNY	91,539	107,733	74,998	75,833	77,475	427,578

APPENDIX D: EMPOWER+ PAST PERFORMANCE DETAILS

Table 46: EmPower+ Low-Income Projects by Electric Utility Territory

	2020			2021			2022			2023			2024			2025			Total		
Electric Utility Territory	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total
Central Hudson Gas & Electr	107	122	228	129	131	259	48	164	206	391	129	477	607	155	697	237	249	387	**1519**	**950**	**2254**
Consolidated Edison	28	1061	1089	56	1702	1752	236	2137	2225	2171	990	2691	4731	546	5128	1398	1456	2542	**8620**	**7892**	**15427**
Municipal Electric	113	43	155	189	28	217	207	78	280	623	38	649	806	56	827	337	173	440	**2275**	**416**	**2568**
National Grid	1339	2760	4071	1664	3224	4829	1001	4351	5285	6885	2178	8537	8989	1661	10309	3674	2427	5228	**23552**	**16601**	**38259**
NYS Electric & Gas	559	1425	1935	810	1517	2290	449	1946	2356	3006	1164	3835	3962	1152	4707	1684	1323	2459	**10470**	**8527**	**17582**
Orange & Rockland	118	384	499	143	452	580	272	1730	1876	1335	1252	2185	800	1154	1850	558	546	968	**3226**	**5518**	**7958**
PSEG Long Island	184	1	184	414	5	418	254	36	274	305	14	319	320	1	321	398	164	482	**1875**	**221**	**1998**
Rochester Gas & Electric	333	1287	1553	433	1407	1802	277	1746	2009	3073	906	3689	4564	643	4960	2096	1321	2963	**10776**	**7310**	**16976**

Includes all projects, grouped by electric utility. Note that there may be duplication between ratepayer and non-ratepayer project counts

Table 47: EmPower+ Low-Income Projects by Gas Utility Territory

	2020			2021			2022			2023			2024			2025			Total		
Electric Utility Territory	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total
National Fuel Gas	365	1169	1520	530	1172	1678	363	1639	1965	2440	1079	3310	3158	923	3936	1550	1079	2137	**8406**	**7061**	**1456**
National Grid (KEDLI)	34		34	99	6	105	111	22	127	113	8	121	164	1	165	136	66	177	**657**	**103**	**729**
National Grid (KEDNY)	3	761	764	3	1127	1130	204	1707	1774	1583	647	1917	3618	250	3827	1001	999	1850	**6412**	**5491**	**11262**

Includes only projects that have a different gas utility from their electric utility. Note that there may be duplication/overlap with project counts reported in the electric utility service table. Note that there may be duplication between ratepayer and non-ratepayer project counts.

Table 48: EmPower+ Moderate-Income Projects by Electric Utility Territory

	2020			2021			2022			2023			2024			2025			Total		
Electric Utility Territory	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total
Central Hudson Gas & Electric		26	26		70	70		25	26		19	19	5	65	65	37	32	62	**42**	**237**	**268**
Consolidated Edison		31	31		30	30		20	20		30	30	5	179	179	135	75	185	**140**	**365**	**475**
Municipal Electric	42	1	43	109		109	28	1	29	9		9	23		23	25		25	**236**	**2**	**238**
National Grid		971	971		2219	2219		960	960		239	239	52	464	469	306	202	436	**358**	**5055**	**5294**
NYS Electric & Gas		536	536		1076	1076		550	550		105	105	18	188	188	132	92	188	**150**	**2547**	**2643**
Orange & Rockland		28	28		52	52		27	27		6	6		24	24	31	29	51	**31**	**166**	**188**
PSEG Long Island													6	21	21	44	24	53	**50**	**45**	**74**
Rochester Gas & Electric		995	995		2037	2037		1016	1016		161	161	17	309	311	126	82	188	**143**	**4600**	**4708**

Includes all projects, grouped by electric utility. Note that there may be duplication between ratepayer and non-ratepayer project counts.

Table 49: EmPower+ Moderate-Income Projects by Gas Utility Territory

	2020			2021			2022			2023			2024			2025			Total		
Electric Utility Territory	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total	Ratepayer	Non-Ratepayer	Total
National Fuel Gas	8	398	406	6	854	860	4	403	407		90	90	26	183	190	123	76	165	**167**	**2004**	**2118**
National Grid (KEDLI)				1		1		1	1				4	11	11	15	8	18	**20**	**20**	**31**
National Grid (KEDNY)		18	18		12	12		10	10		16	16	1	91	91	61	35	88	**62**	**182**	**235**

Includes only projects that have a different gas utility from their electric utility. Note that there may be duplication/overlap with project counts reported in the electric utility service table. Note that there may be duplication between ratepayer and non-ratepayer project counts.

APPENDIX E: ABBREVIATIONS AND ACRONYMS

Abbreviation/ Acronym	Definition
AEA	Association for Energy Affordability
AMEEP	Downstate Affordable Multifamily Energy Efficiency Program
AMI	Area Median Income
AMP Up	Affordable Multifamily Program Upstate Program
BPCA	Building Performance Contractors Association
CBO	Community-based Organizations
CDFI	Community Development Financial Institution
CEI	HCR Clean Energy Initiative
Climate Act	Climate Leadership and Community Protection Act
Commission	New York State Public Service Commission
CRP	Customer Referral Plan
DACs	Disadvantaged Communities
DHCR	HCR's Division of Housing and Community Renewal
DHW	Domestic hot water
Direct Injection	Housing Agency Assistance
DOE	Department of Energy
Downstate Utilities	Consolidated Edison and National Grid
DPS	New York State Department of Public Service
EE/BE	Energy efficiency and building electrification
EEC	Energy Equity Collaborative
EM&V	Evaluation, measurement and verification
EUL	Effective Useful Life
EV	Electric Vehicles
FTE	Full Time Equivalent

HCR	New York State Homes and Community Renewal
HEAR	Federal Inflation Reduction Act Home Electrification and Appliance Rebates
HERR	Heating Equipment Repair and Replacement
HPD	New York City Housing Preservation and Development
HTFC	Housing Trust Fund Corporation
Hubs	Regional Clean Energy Hubs
IPMVP	International Performance Measurement and Verification Protocol
IRA	Inflation Reduction Act
LIHTC	Low Income Housing Tax Credits
LIPA	Long Island Power Authority
LMI Order	Order Authorizing Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030 (filed May 15, 2025)
LMI	Low-to Moderate Income
MOTD	Money-out-the-door
MREP	Multifamily Residential Energy Pathways (also referred to as NYSERDA's Multifamily Contractor Network)
MWBE	Minority- and Women-Owned Business Enterprises
Non-LMI Order	Order Authorizing Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios for 2026-2030 (filed May 15, 2025)
Non-LMI	Non-Low-to Moderate-Income
NPA	Non-Pipes Alternative
NWS	Con Edison's Non-Wires Solutions
NYC	New York City
NYGB	NY Green Bank
NYHEP	NY Home Energy Portal
NYPA	New York Power Authority
NYS	New York State
NYSAFA	New York State Association of Affordable Housing
NYSERDA	New York State Energy Research and Development Authority

Order Directing Proposals	Order Directing Energy Efficiency and Building Electrification Proposals (filed July 20, 2023)
OTDA	New York State Office of Temporary and Disability Assistance
PA	Program Administrator
PC&IP	Participating Contractor and Industry Partner
PLP	Small Building Participation Loan Program
PSC	New York State Public Service Commission
PSEG	Public Service Electric and Gas
PSEGLI	Public Service Electric and Gas Long Island
QA/QC	Quality Assurance and Quality Control
QMS	Quality and Market Standards
REDC	Regional Economic Development Council
REDi	Resilient & Equitable Decarbonization Initiative
RGGI	Regional Greenhouse Gas Initiative
RLDAG	Residential LMI and DAC Advisory Group
RMAG	Residential Market Advisory Group
SDVOB	Service-Disabled Veteran-Owned Business
SMI	State Medium Income
State	State of New York
TA	Technical Assistance
TRM	Technical Resource Manual
Utilities	Central Hudson Gas & Electric Corporation, Consolidated Edison Company of New York, Inc., KeySpan Gas East Corporation d/b/a National Grid, Brooklyn Union Gas Company d/b/a National Grid, National Fuel Gas Corporation, New York State Electric & Gas Corporation, Niagara Mohawk Power Corporation d/b/a National Grid, Orange & Rockland Utilities, Inc., and Rochester Gas & Electric Corporation.
VGS	NYS Department of Public Service Verified Gross Savings Guidance
WAP	Weatherization Assistance Program
WFD	Workforce Development