



**Department  
of Public Service**

**Thank you for joining!  
The webinar will begin shortly.**



**Department  
of Public Service**

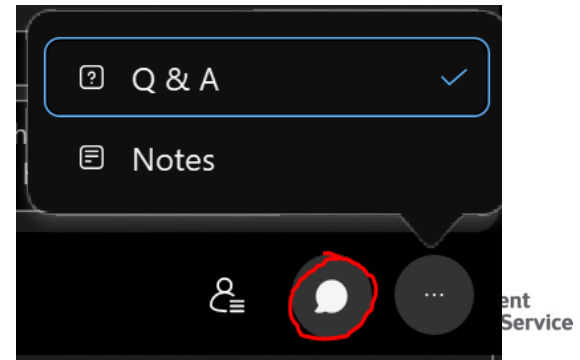
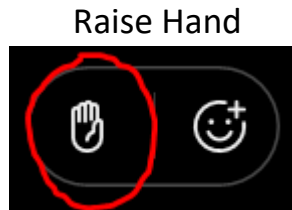
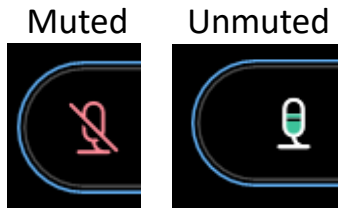
# LMI EE/BE Performance Management Framework

Webinar Discussion

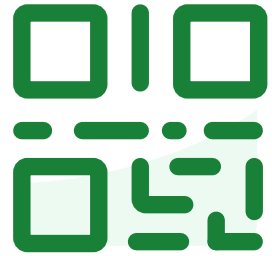
July 7, 2025

# Housekeeping

- Run time: 1:00 pm – 3:00 pm
- Participants are muted upon entry but able to unmute themselves.
- Chat is enabled but will not be monitored for questions.
- Please use the Q&A feature or raise hand feature to ask a question. Staff will follow-up any unanswered questions in the Q&A following today's webinar.
- Materials from today's webinar, including slides and summary notes will be posted to DMM: 25-M-0249



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# What type of organization do you represent?

# Agenda

1. Goals for Today
2. Overview of the LMI Energy Efficiency and Building Electrification Portfolio
3. LMI EE/BE Performance Management
4. Discussion on LMI EE/BE Performance Management
5. Next Steps

# Goals for Today

1. Discuss the development of a performance management process for the LMI EE/BE programs
2. Obtain feedback from participants on performance management priorities
3. Identify next steps

What are you hoping to get out of today's webinar? Let us know in the chat!





**Use one word to describe  
your interest in LMI EE/BE  
performance management  
process.**

# LMI EE/BE Order

# LMI EE/BE Order

- \$1.5 billion in energy efficiency and building electrification programs targeting the low-to moderate-income market segment from 2026-2030
- Administered by NYSERDA, Con Edison, and National Grid (KEDLI and KEDNY)
- Requirement for Staff to improve oversight of portfolio, facilitate a transition of current Joint Management Committee model, and develop a performance management process
- Established objectives for the LMI EE/BE Portfolio

# LMI EE/BE Portfolio Objectives

- Reduce energy consumption and cost for households experiencing the greatest energy burden;
- Maximize the impact of ratepayer funds through effective coordination, the leveraging of other funding sources, and administrative efficiencies;
- Simplify participation and administrative burden for applicants and contractors;
- Seek and incorporate feedback from market participants in the design and implementation of programs;
- Enhance transparency in program and portfolio performance; and
- Ensure clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets.

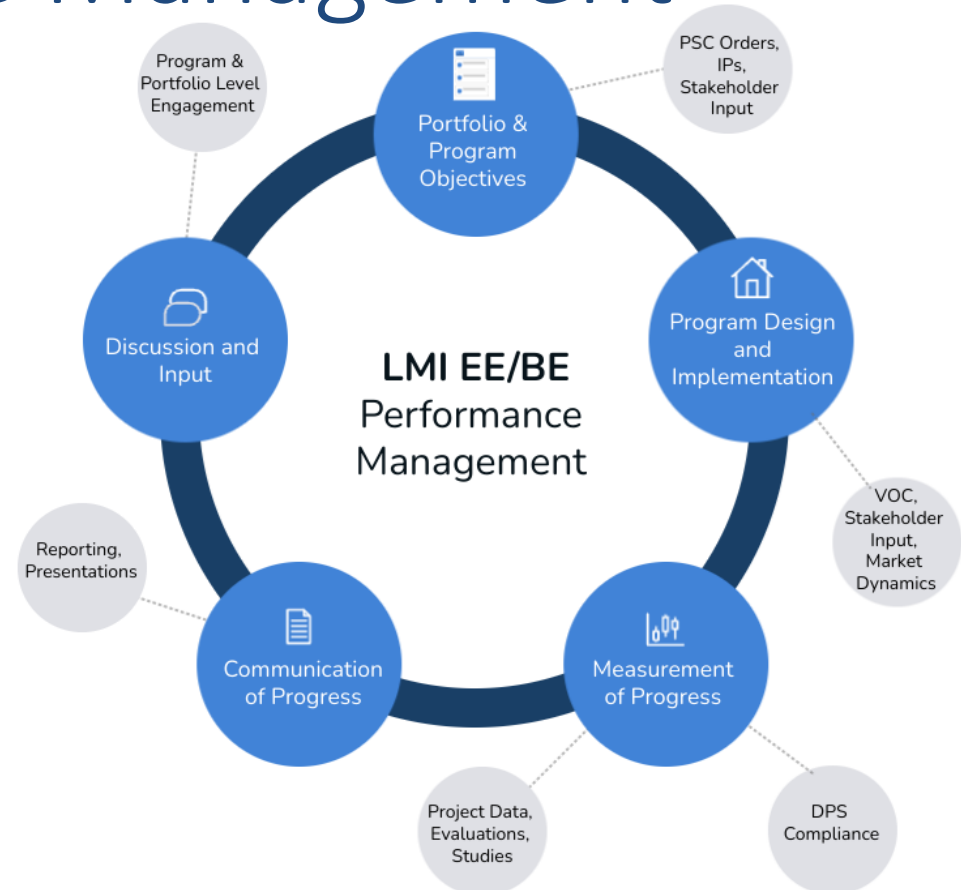
# Performance Management Requirements

- DPS Staff ordered to establish a framework that can be used to track progress and measure the overall performance of the 2026-2030 LMI programs and portfolio
  - Should provide ability for DPS Staff, Program Administrators, and stakeholders to have visibility into key program metrics and outcomes
  - Include plans for enhanced stakeholder engagement
  - An assessment and potential modification of PA reporting requirements, including type and level of program performance metrics that should be reported
  - Identify key performance indicators (KPI) for the LMI programs to measure progress towards PSC objectives

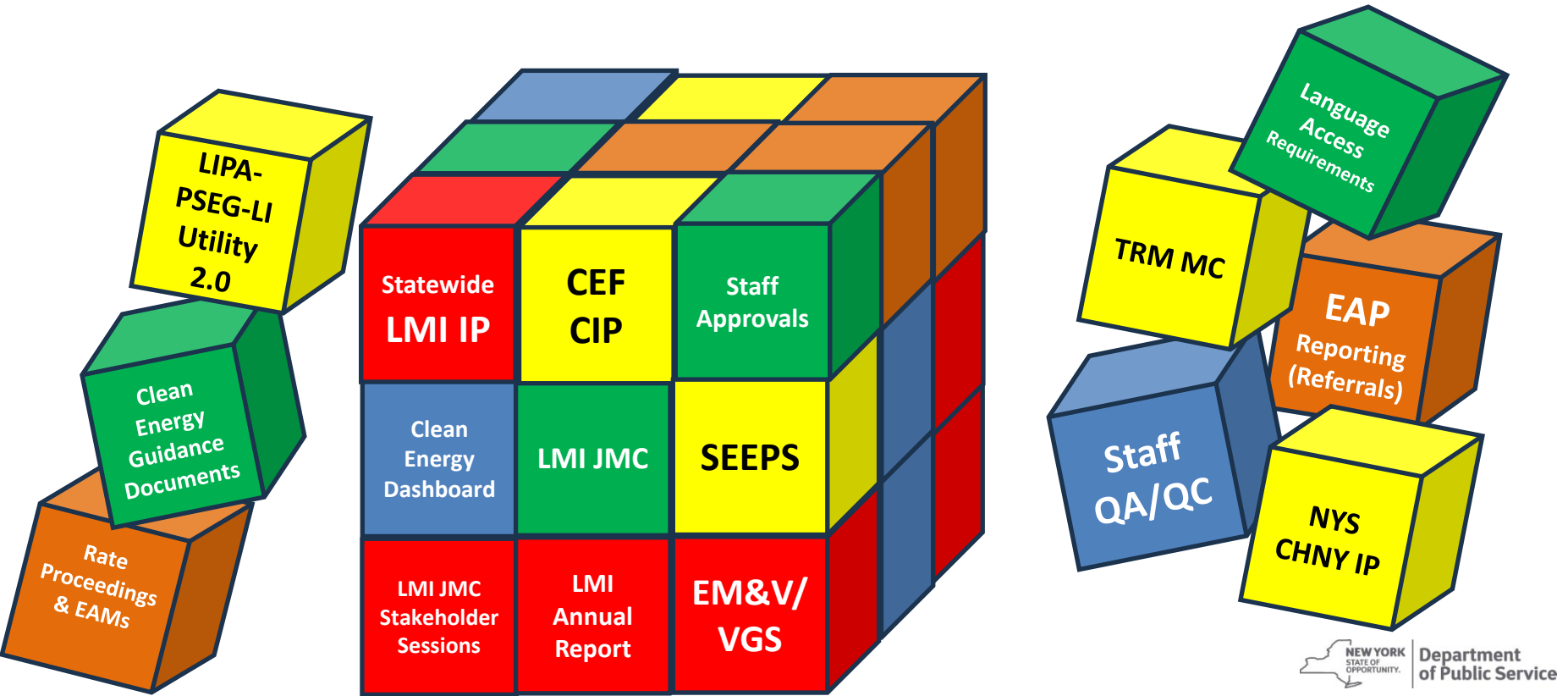
# Performance Management

# Performance Management

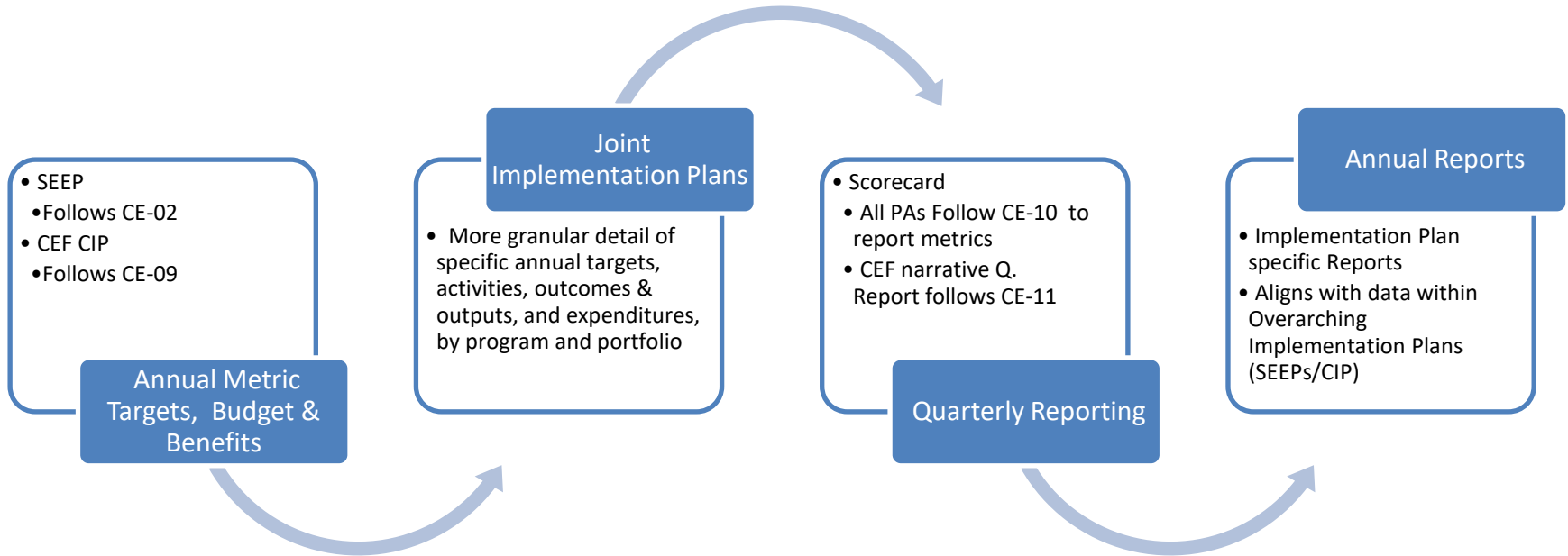
- LMI EE/BE Performance Management Principles
  - Process of continuous improvement of portfolio and individual programs
  - Measurement of progress towards objectives and goals
  - Visibility on Portfolio and program progress towards achieving goals/objectives
  - Input and discussion from program stakeholders, including voice of customer
- Considerations
  - Balancing burden of reporting and measurement; consistency with Non-LMI
  - Method and timing of measurement (program metrics vs. studies)



# Relevant LMI EE/BE Workstreams



# LMI Reporting



# Performance Management Today

- Objectives/requirements set out in Commission Orders
- Reporting requirements for PAs (Commission directed or Staff Guidance)
- DPS Oversight
  - Compliance via review of filings
  - DPS Staff guidance documents
  - DPS Staff approval/rejection of filings
- Current LMI Portfolio with JMC and stakeholder engagement requirements

Report	Frequency
Scorecards	Quarterly
SEEP (Utility PAs)	Annual, with quarterly updates
CIP (NYSERDA)	Annual, updated as needed
VGS Specs	Quarterly
LMI Imp. Plan	As Needed
LMI Annual Report	Annual

# Opportunities for Improvement

- Enhanced feedback loop on programs, from design to implementation
  - Stakeholder engagement at program design and in program review
  - Documentation of stakeholder input
- Continued focus on efficiency, efficacy, and impact
  - Tracking Money-Out-The-Door (MOTD) metric
  - Tracking geographic distribution of projects

# Discussion

# 1. Outcomes and Metrics

- What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?
- What metrics or data points can be used to measure progress towards the outcomes that you have identified?

# Outcome and Metrics Reference

## EE/BE Portfolio Objectives

- Reduce energy consumption and cost for households experiencing the greatest energy burden;
- Maximize the impact of ratepayer funds through effective coordination, the leveraging of other funding sources, and administrative efficiencies;
- Simplify participation and administrative burden for applicants and contractors;
- Seek and incorporate feedback from market participants in the design and implementation of programs;
- Enhance transparency in program and portfolio performance; and
- Ensure clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets.

## Reported Metrics

- Budgets
- Expenditures
- Annual Energy Savings (MMBtu, MWh)
- Annual Energy Usage (MMBtu, MWh)
- Lifetime Energy Savings (MMBtu, MWh)
- Participant Bill Savings
- Unit Costs (\$/MMBtu and \$/MWh)
- Measure Mix
- Participants
- Leveraged Funds
- Indirect Savings



**Outcomes & Metrics Q1: What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?**




**Outcomes & Metrics Q2: What metrics or data points can be used to measure progress towards the outcomes that you have identified?**

## 2. Reporting and Accessibility

- How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?
- How would you rate the accessibility of portfolio or program information and/or data?
- How do you prefer to access information and/or data on the LMI portfolio and/or programs?

# Primary Modes of Reporting

 An official website of New York State. [Here's how you know.](#)

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**Matter Master: 18-00381/18-M-0084**

Matter Number:	18-00381	Case Number:	18-M-0084
Industry Affected:	Miscellaneous	Company/Organization:	New York State Department of Public Service
Matter Type:	Petition	Matter Subtype:	Non-Standard
Title of Matter/Case:	In the Matter of a Comprehensive Energy Efficiency Initiative.	Related Matter/Case No.:	<a href="#">20-09201 - 20-M-0187</a>
		Assigned Judge:	<a href="#">Expand</a>



Filed Documents (1930) Public Comments (2410) Party List (55) Calendar (0)

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Sr.No.	Date Filed	Document Title	Filing On Behalf Of	Item No.	File Name	File Size
1	07/09/2025		Central Hudson Gas & Electric Corporation	<a href="#">956</a>		
2	07/09/2025		Central Hudson Gas & Electric Corporation	<a href="#">956</a>		
3	07/09/2025		Central Hudson Gas & Electric Corporation	<a href="#">956</a>		

**Clean Energy Fund  
Compiled Investment Plans**

Case Number 14-M-0084  
Filed July 3, 2024

**Statewide Low- to Moderate-Income Portfolio  
Implementation Plan**

Version 4

Jointly Filed By:

The Brooklyn Union Gas Company d/b/a National Grid NY  
Central Hudson Gas & Electric Corporation  
Consolidated Edison Company of New York, Inc.  
KeySpan Gas East Corporation d/b/a National Grid  
National Fuel Gas Distribution Corporation  
Niagara Mohawk Power Corporation d/b/a National Grid  
New York State Electric & Gas Corporation  
New York State Energy Research and Development Authority  
Orange and Rockland Utilities, Inc.  
Rochester Gas and Electric Corporation

Filed: November 1, 2023


Case 18-M-0084  
Case 14-M-0094

Pursuant to New York Public Service Commission Order Adopting  
Accelerated Energy Efficiency Targets and Building  
Order Authorizing Utility Energy Efficiency and Grid  
Electrification Portfolios Through 2025

Central Hudson Gas & Electric

**System Energy Efficiency Plan**

2019-2025

 An official website of New York State. [Here's how you know.](#)

**Clean Energy Dashboard** [Glossary](#)

Visit NYSERDA's Homepage Clean Energy Dashboard [Language](#)

[BACK TO CLEAN ENERGY DASHBOARD INTRODUCTION](#)

**Clean Energy Dashboard**

View Data Tables

OVERVIEW UTILITY NYSERDA PROGRAM INVENTORY

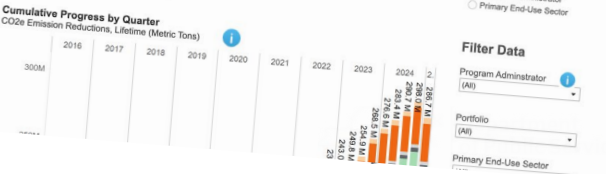
Select Metric  
CO2e Emission Reductions, Lifetime (Metric Tons)

**Cumulative Progress by Quarter**  
CO2e Emission Reductions, Lifetime (Metric Tons)

Data beginning 2016 and current through 2025 Q1

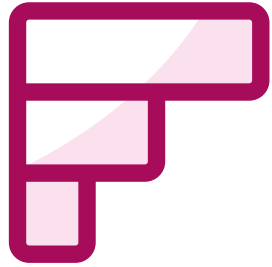
**View Data By**  
 Program Administrator  
 Primary End-Use Sector

**Filter Data**  
 Program Administrator (All)  
 Portfolio (All)  
 Primary End-Use Sector





**Reporting and Accessibility Q1: How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?**



**How would you rate the  
accessibility of portfolio or  
program information and/or  
data?**



**Reporting and Accessibility Q3: How do you prefer to access information and/or data on the LMI portfolio and/or programs?**

# 3. Stakeholder Engagement

Program Administrators to seek and incorporate feedback from market participants in the design and implementation of programs.

DPS Staff additionally propose:

Quarterly Virtual Meetings	Bi-Annual In-Person Meetings
<ul style="list-style-type: none"> <li>- Review program activities.</li> <li>- Discuss challenges &amp; opportunities.</li> <li>- Open space to discuss emerging issues.</li> </ul>	<ul style="list-style-type: none"> <li>- Downstate &amp; Upstate locations.</li> <li>- Process improvement &amp; workshops.</li> <li>- Bring in additional expertise.</li> </ul>

## Discussion:

- What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?
- Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.
- How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders?
- What is your preferred format for DPS Staff led engagement sessions on the LMI EE/BE Portfolio, programs, and related issues?



**Engagement Q1: What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?**



**Engagement Q2: Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.**



**Engagement Q3: How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders?**



**What is your preferred format for DPS Staff led engagement sessions on the LMI EE/BE Portfolio, programs, and related issues?**

# 4. Additional Considerations



**What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?**

# Next Steps

- July 14, 2025 DPS Staff Filing on Performance Management Framework
- Webinar participants are able to follow up with additional thoughts on the performance management process for the LMI Portfolio and programs via email at [Equity@dps.ny.gov](mailto:Equity@dps.ny.gov) using the subject line: LMI Performance Management
- DPS/PA deep dive into program data and systems considerations
- Several stakeholder meetings- August, September, October
  - Poll to be distributed via email
- Development/updating of Staff Guidance

NYS Department of Public Service

LMI EE/BE  
Performance Management  
Webinar Discussion

July 7, 2025

Summary of Input

# Discussion Questions

## Introductions

- What type of organization do you represent?
- Use one word to describe your interest in LMI EE/BE performance management process.

## Outcomes & Metrics

- What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?
- What metrics or data points can be used to measure progress towards the outcomes that you have identified?

## Reporting and Accessibility

- How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?
- How would you rate the accessibility of portfolio or program information and/or data?
- How do you prefer to access information and/or data on the LMI portfolio and/or programs?

## Engagement

- What is your preferred format for DPS Staff led engagement sessions on the LMI EE/BE Portfolio, programs, and related issues?
- What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?
- Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.
- How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders?

## Additional Considerations

- What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?

## What type of organization do you represent? (1/2)

Consumer Advocate



Community-Based Organization



State or Local Government



Program Administrator



Contractor or Installer



Other



## What type of organization do you represent? (2/2)

None (I am not affiliated with an organization)

0 %

**Use one word to describe your interest in LMI  
EE/BE performance management process.**



## Outcomes & Metrics Q1: What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?

(1/3)

- Data on what appliances and electrical systems are in households. Cost and specifics of health and safety
- \*LMI
- # of actual dollars spent on lmk per project cost
- Energy independence
- ability to increase uptake by lower capacity lmi buildings
- increased transparency related to deferrals.
- Efficient and Equitable distribution of funds
- Reduced time spent per application on the part of participants, contractors, hubs, and administrators
- Documentation of program changes required by DPS
- reduced administrative burden for customer and contractors.
- Peak load reduction from eventual heat pump installations
- Percentage of rental units served
- Reduced frustration in program use
- Improved housing stability

## Outcomes & Metrics Q1: What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?

(2/3)

- Weatherization
- Cost reduction when fuel switching
- remembering these programs are all about humans not data points and allowing flexibility and exceptions
- No of housing unit served, by income segment, housing tenure and typology
- Additional funding secured for programs
- Equity
- Geographic analysis for equity
- Lmi are getting served with most work done with no cust contributions. No heats get served regardless if weatherizatiin upgrades
- equitable distribution of benefits across geography and income levels
- Clear program rules
- Ease of use: the program should not be hard to understand or apply for Meeting the climate goals: Program uptake should be growing

## Outcomes & Metrics Q1: What are the outcomes of the LMI EE/BE portfolio and/or programs that matter most to you?

(3/3)

- Number of units and buildings
- Empowerment of more LMI individuals, households, and adjacent organizations in energy system
- Equity
- Improved health and safety
- Responsible use of funds
- decarbonization -- CO2e savings
- tracking towards CLCPA goals and legislated climate outcomes.
- Health and safety improvements
- Clear program rules
- Energy burden
- Conversion of LMI natl gas households to heat pumps
- LMI annual LMMBtu Targets
- Utility referrals to projects complete
- Equitable distribution of resources
- Reduced energy burden for vulnerable households
- Reduce energy demand per home
- Reduction of household energy burden.
- Arrears reduction

## Reporting and Accessibility Q1: How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?

(1/3)

- It would be great if this existed as a refreshable GIS layer
- Reports don't enable analysis bc data isn't in usable format for our own analyses
- Not aware of the reports presented and the "many more"
- search DMM for utility filings
- I have tried to use NY Open Data, but it is difficult to navigate. Filings in DMM from each utility have obscure names and there are so many that it's hard to know what you're even looking for unless you've studied all the acronyms ahead of time. reporting by each individual utility makes it difficult, especially when data are filed in PDFs instead of Excel sheets
- Looking for relevant filings on DMM
- I do access things on the DMM. However, when the data is in multiple filings from

## Reporting and Accessibility Q1: How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?

(2/3)

multiple program administrators and not in the same format, it makes analysis very time consuming

- DAC filings
- Currently not aware of the specific reports used for LMI reporting
- Not sure where to find this
- On DMM - but I find it hard to find what I'm looking for.
- Just talking to customers and contractors about how things are

going, as well as program updates, no data really.

- I'm not sure how to find program information
- Was not aware of most of these reports and resources
- Dashboard
- NY open data but it only has the bare minimum of data that is needed to do any substantive analysis and there needs to be MUCH more shared
- Direct reportage by clients

## **Reporting and Accessibility Q1: How do you typically access information on how LMI EE/BE programs are doing with respect to outcomes and specific metrics?**

(3/3)

who are accessing programs.

- Salesforce NYHEP portal
- PA reports
- Clean Energy Dashboard
- Talk to contractors about project status
- from my hub
- I don't generally access this information as I am not aware of how to do so
- from the internet
- Annual LMI report

## Outcomes & Metrics Q2: What metrics or data points can be used to measure progress towards the outcomes that you have identified?

(1/4)

- Per unit levels of investment by geography, DAC status, race
- Delay of approvals for projects - how long are contractors waiting
- \*deferral
- And the sharing of all raw data, not just what NYSERDA wants to share
- I want to second the referral mitigation suggestion
- Time and Location based load reduction in kW (prior to or as part of heat pump installation)
- Distribution of projects by utility territory, socio-demographic indicators, and disadvantaged community (DAC) status.
- Length of project completion timeline
- Reporting out by NYSERDA on number of program changes occurring monthly
- value of rate payer investment spend vs other possible interventions
- deferral mitigation, braided services

## Outcomes & Metrics Q2: What metrics or data points can be used to measure progress towards the outcomes that you have identified?

(2/4)

- Increased or decreased friction in the customer journey.
- Conversion rate from interested lead to projects completed
- No of various measures by housing type, income, geography and in DACs
- Customer contribution and number of projects that get done related to that
- Data on incentive amounts and percent of project cost that it covers
- How many hours does an application take from start to finish
- Market penetration
- Number of new people and organizations that participate in energy-related public engagement processes (feedback on energy programs or policies, be these NYSERDA or utilities or other)
- Number of times a premises has been served.
- The number of homes that are deferred

## Outcomes & Metrics Q2: What metrics or data points can be used to measure progress towards the outcomes that you have identified?

(3/4)

- is program ACCESS growing?
- DAC participation rate
- number of deferrals from the program, as well as number of deferrals rectified and able to access the program
- percentage of stakeholder feedback/ideas incorporated into program design
- % Reduction in Energy Savings
- Project cost effectiveness
- distribution of participating households by income band
- Percent of incentive dollars going to DACs and going to LMI households (separately)
- Geographic distribution of projects
- Access to energy usage before and after the projects are completed.
- cost per project, including customer costs
- Number of LMI households receiving retrofits in NYC increases
- Residents utility bill
- Number of people

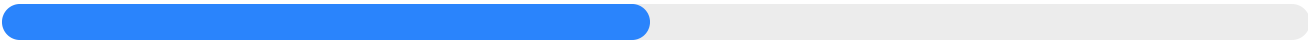
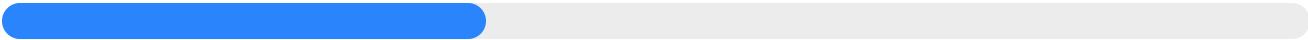
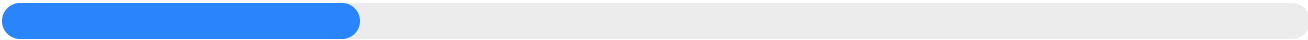
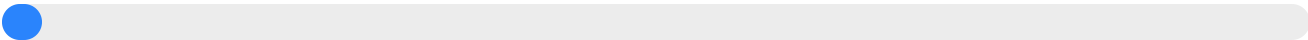
**Outcomes & Metrics Q2: What metrics or data points can be used to measure progress towards the outcomes that you have identified?**

(4/4)

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who participate in energy literacy training

## How would you rate the accessibility of portfolio or program information and/or data?

1. Poor: I do not know where to find information and/or data on the LMI portfolio and programs. Or I know where to find the information and/or data, but it is inaccessible.  

2. Needs Improvement: I sometimes can find the information that I'm looking for, and the information is not always accessible.  

3. Adequate: I can usually find the information that I need.  

4. Great: I know where to find information and/or data on the LMI portfolio and programs and it is accessible.  


## Reporting and Accessibility Q3: How do you prefer to access information and/or data on the LMI portfolio and/or programs?

(1/2)

- second Eric's request about customer-facing reporting
- Email notifications with links to secure sites
- second the request for a resource library -- a central location with clear links to what's available where
- Email updates coupled with program modification notes being applied. Links in the email allowing one to drill down as needed would make email easier to review.
- scheduled, concise, emails
- summary dashboard of key metrics across the program. Something like NY-Sun has (easy charts which show MW allotted and MW remaining) -- progress towards budget, savings targets, etc
- Email summaries, updates at monthly/ quarterly meetings List of websites in a library
- Email newsletter
- maybe newsletter with updates, attack us with information

## Reporting and Accessibility Q3: How do you prefer to access information and/or data on the LMI portfolio and/or programs?

(2/2)

- email
- Simplicity and consistency
- online any of the above - whatever is legible and easily accessible (not requiring many levels of clicking)
- many channels to inform, the more the better
- Emails
- Email blast with all the relevant links (with or without short summary)
- email blast, weekly updates, live board
- Emails
- Easy to access and easy to use dashboard
- email
- Email blasts

## What is your preferred format for DPS Staff led engagement sessions on the LMI EE/BE Portfolio, programs, and related issues?

In person meetings (in either NYC or Albany)



Virtual meetings



Hybrid (in person and in a physical location)



Other



## Engagement Q1: What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?

(1/3)

- Move from gathering feedback to collaborative decision-making about program design
- More stakeholder involvement during the development and implementation process.
- Thanks for offering regular meetings!
- Focus groups with program participants and those deferred is a great one
- Hubs should be working directly with program administrators to design programs in "working sessions"
- Encourage state wide contractor licensing.
- At the table with all stakeholders during program design
- The Order says "As part of its ongoing administration of the EmPower+ program, the Commission directs NYSERDA to assess opportunities to maximize the ability for the program

## Engagement Q1: What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?

(2/3)

to reach as many LMI households as possible with weatherization and energy efficiency upgrades.” The DPS should direct NYSERDA not to throttle programs that serve LMI households.

- A more interactive notice board and digital space for stakeholders and the public to engage and have visibility.
- Redesign the quarterly clean energy scorecard and incorporate dashboard to track and monitor progress on KPIs.
- Focus groups with participants who successfully made it into programs and those who didn't.
- Clear communication from the programs about what is actually done in the programs.
- DPS staff arrange with Hubs in person meetings with stakeholders in each region at least on annual basis to increase participation of diverse stakeholders, and reduce distance between DPS staff and people on the ground

## **Engagement Q1: What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?**

(3/3)

- Meetings with PAs as they do program designs
- Regular real-time feedback from the Hubs
- wider eligibility

**Engagement Q2: Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.**

(1/3)

- Program administrator websites on EE/BE program offerings.
- Bring back the low Income form on energy
- Something like the NYSERDA Energy-Equity collaborative with stakeholders from across the state who get paid to think about and reflect
- on the indicators and progress, what gets measured, etc. With stakeholders from impacted communities, and those not seen often
- I think simpler KPI dashboards that allow the public to have a better idea of what's happening, as already discussed, would improve engagement
- Different in person quarterly

**Engagement Q2: Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.**

(2/3)

meeting formats. - Roundtable vs classroom + panel format Other modes - follow successful in person / online forums

- Could have focus groups
- For me, it's less about the venue and more about the quality of the conversation. Is there a lot of back and forth and collaboration that

increases shared understanding of the program constraints and barriers from multiple perspectives? And shared decision-making process in which everyone is heard and feedback is incorporated?

- Cust help line to answer questions?
- A central website with an option to post questions

**Engagement Q2: Are there modes of engagement beyond virtual and in-person forums that would be valuable to improving visibility into and engagement on program and portfolio performance? If so, please describe your thoughts.**

(3/3)

that can be answered in the monthly email.

- fodder for newsletter email blasts?  
one-sheet summary of topic and call for asynchronous feedback
- (would be helpful to have examples of types of engagement sought to think this through more)

## **Engagement Q3: How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders?** (1/3)

- better communication overall. NYSERDA will attempt to reduce admin burden and then get new rules for needing new data etc and the complications go back up and the middle men (hubs and contractors) don't have a strong enough understanding of what is happening to explain to the customer
- DPS needs to be at more contractor meetings
- Better interfacing of Hubs with vital information
- Better connect hub engagement opportunities with actual planning and decision timelines. Right now, they are disjointed and waste hub's time.
- Engagement with contractor groups is lacking
- NYSERDA currently meets with the Hubs and BPCA on

## Engagement Q3: How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders? (2/3)

- alternate weeks. What would more collaboration look like?
- Aligned select time based (quarterly/ annually) performance metrics that roll up into a living scoreboard that should be visible in all convenings
  - I'm not aware of any real engagement opportunities from program administrators. I'm more aware of "information" sessions. Not actual engagement.
  - Better outreach to contractors from HUBS in their area.
  - Collaboration, collaboration, collaboration. Work together!
  - DPS should be taking over all engagement activities to ensure PA's actually listen and utilize recommendations
  - Nyserda should now have several years of HUB data. Have they assembled and summarized?
  - Utilize the existing

## **Engagement Q3: How can existing stakeholder engagement opportunities through the Program Administrators and the Regional Clean Energy Hubs be brought into alignment to reduce administrative burden for stakeholders?** (3/3)

- Hubs infrastructure. We already provide application support and connection to programs for clients (e.g. Hub priority for applications)
- Streamline and link program offerings on Program Administrator websites.
- share this aggregated feedback through a forum or regular PA meeting
- Broaden annual Hubs conference into wider stakeholder engagement opportunity
- Support annual meetings hosted by the people doing the actual work (i.e. BPCA and BPA)

## What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?

(1/5)

- Keep admin costs in check and use funding for LMI
- How do program budget limitations affect program intake?
- Health validated metrics
- Value of DPS Staff consultation in the delivery of portfolio goals. This cannot be overstated considering data transparency, contractor participation and other issues discussed.
- Review of fed impact on current programs and financial offerings to clients
- Clear hierarchy of desired outcomes
- goal alignment. The CLCPA has climate justice at the forefront but the actual LMI programs themselves are just measured on cost effectiveness and carbon saved thus make decisions that do not prioritize equity.
- Clarity of purpose. Are we to focus on CO2 reduction/electrification? Reducing energy burden? Goals can conflict with work needed.

## What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?

(2/5)

- Value of DPS staff being in close contact to LMI voices directly, or see up front how programs are working, and not just relying on data
- Please make reports more customer-friendly. PA filings are written in overly technical language and PA websites do not discuss EE/BE programs in a holistic way. It would be greatly beneficial to review how Massachusetts presents their 3-year plans in a very readable, but still precise way to communicate their goals, metrics, etc and try to emulate that.
- Qualitative data on programs is just as important as quantitative data
- Value of utility pilots related to health and safety measures (e.g., KEDNY/KEDLI) to LMI EE/BE portfolio.
- Whatever comes from

## What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?

(3/5)

this feedback and the plan, it would be great to have focus groups vet the results before finalizing.

- Distrust of Utility Companies due to billing practices/ rate increases should influence how much of a role they take in the process.
- Value of increase in energy literacy and capacity for engaging in the questions that are arising from our state's transition to a renewable energy future
- I think it's important

to think deeply about who the program administrators are accountable to. I think the answer to this question will help guide from whose perspective the programs should be measured. There may be more than one answer, but each of these answers will point to perspectives that must be engaged and what should be measured.

- Consider how program administrators will be held

## What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?

(4/5)

- accountable when they fall short of metrics, and how they will be incentivized to achieve more than the minimum
- Hearing from those served by the program and those we would like to serve better via questionnaires, public meetings, surveys etc
- Additional metrics may require an increase in data points that a contractor is expected to gather and/or update
- Continue to utilize the Hubs as we are
- already doing this boots on the ground work
- Health and safety measures that need to be done before weatherization work can be completed.
- Implications for program performance and the CLCPA
- Some qualitative issues (like hard to reach residents served)
- Perhaps overview of other on frameworks in other states
- How do LMI and DACs reporting requirements fit together?

**What additional considerations should DPS Staff have in developing the performance management process for the LMI EE/BE Portfolio?**

(5/5)

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- Customer journey mapping