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



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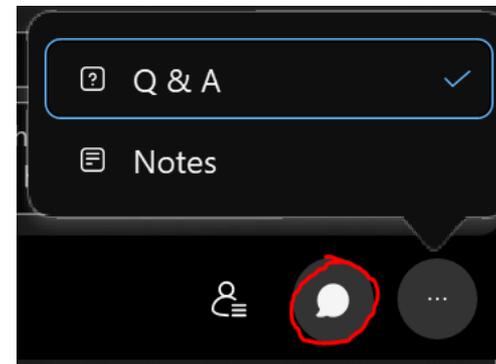
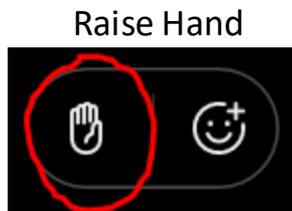
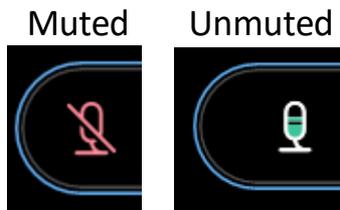
# LMI Energy Efficiency and Building Electrification ( EE/BE) Portfolio Webinar

Preview of LMI EE/BE Portfolio and Programs

February 9, 2026

# Housekeeping

- Run time: 3:00PM-4:30PM
- Participants are muted upon entry.
- Chat is enabled for participating in discussions but may not see questions posted there.
- 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



# Goals for Today

1. Discuss updates on the LMI EE/BE Portfolio
2. Preview the LMI EE/BE programs launching in 2026
3. Discuss next steps regarding implementation and management of the LMI EE/BE Portfolio

*What would you like to get out of these webinars?*

*Let us know at [equity@dps.ny.gov](mailto:equity@dps.ny.gov)*



# Today's Agenda

1. Overview of LMI EE/BE Portfolio
2. What's New for the 2026-2030 LMI EE/BE Portfolio
  - Updates from the Program Administrators
    - 1-4 Family (NYSERDA)
    - Affordable Multifamily (NYSERDA, ConEd, National Grid)
    - Workforce (NYSERDA)
    - Engagement (NYSERDA)
3. Performance Management and Future Engagement
4. Wrap Up

# Reminders for a Productive and Respectful Meeting

- This meeting is being recorded. All discussion today is public.
- Share your name and affiliation when speaking and please mute yourself when you are done.
- Respect fellow participants and presenters.
- Step up & step back. Allow space for others; share what you know and learn.
- Be a present and active listener.

# 2026-2030 LMI EE/BE Portfolio Overview

# LMI EE/BE Order- May 15, 2025

- \$1.57 billion in energy efficiency and building electrification programs targeting the low-to moderate-income market segment from 2026-2030
  - 1-4 Family
  - Affordable Multifamily
  - Workforce Development
  - Engagement and Awareness
- Administered by Con Edison, and National Grid (KEDLI and KEDNY), and NYSERDA
- Estimated over 600k LMI households served and 100.4 million MMBtu e- in lifetime energy savings
- Aligns measure eligibility with the Strategic Framework, with some exceptions
- Increased funding available to address pre-weatherization needs
- Outlined parameters for LMI electrification
- Requirement for Staff to improve oversight of portfolio

# LMI Portfolio Objectives

- Reduce energy consumption and cost for households experiencing the greatest energy burden;
- 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.

# Developments Since May 15, 2025 Order

Topic ( <i>Select filings from DMM Case <a href="#">25-M-0249</a></i> )	Format	Filing Date (& Link)
Order Authorizing Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio for 2026-2030	PSC Order	<a href="#">May 15, 2025</a>
2026-2030 LMI EE/BE Order Informational Webinar	DPS Webinar	<a href="#">June 10, 2025</a>
Performance Management Framework (PMF) Webinar – Overview	DPS Webinar	<a href="#">July 7, 2025</a>
PMF Webinar – Outcomes and Metrics	DPS Webinar	<a href="#">August 19, 2025</a>
Customer Referral Plan	PA Report	<a href="#">August 22, 2025</a>
PMF Webinar – Reporting and Access to Information	DPS Webinar	<a href="#">August 22, 2025</a>
PMF Webinar – Ongoing Stakeholder Engagement	DPS Webinar	<a href="#">August 26, 2025</a>
LMI EE/BE Performance Management Framework	DPS Report	<a href="#">September 12, 2025</a>
(Updated) Workforce Development Implementation Plan	PA Report	<a href="#">January 15, 2026</a>
(Updated) LMI EE/BE Portfolio Implementation Plan	PA Report	<a href="#">February 2, 2026</a>

# Program Implementation Updates

# **NYSERDA LMI 1-4 Family Residential**

1

## Tranche 1: Early 2026

1. Contractor Application Submissions
2. Low Income Eligibility Changes (greater of AMI or SMI)
3. Reinstate the 50% project incentive cap for moderate Income
4. Increase project incentive caps for Upstate and Downstate
5. Changes to light bulb eligibility
6. Heat Pump Water Heater incentive changes
7. Update insulation requirements for Heat Pump projects
8. Update project photo requirements

2

## Tranche 2: Q3 2026

1. Incorporate pre-weatherization enhancements to the program
2. Introduce Regional Plans to increase uptake in under-served regions
3. Public Facing Dashboards

3

## Tranche 3: 2027

1. Deploy new project management system (to replace NYHEP)
2. Introduce a Renter Offer
3. Direct install changes

## **The EE/BE Order calls on the EmPower+ program to focus on certain customer types:**

1. Referrals from utilities of customers participating in Energy Assistance Programs.
2. Customers in geographic DACs
3. Customers with high energy cost burden.
4. Customers in areas that have been historically underserved by the program (Capital District, Hudson Valley, New York City, North Country)

## **Program budget goal: maintain a steady monthly pace in incentive expenditures**

Initial program actions:

1. Allow contractors to submit applications for defined customer segments.
2. Establish pipeline management at application submission to maintain program stability and align demand with planned budgets.

## Starting on March 18, 2026 participating contractors will be able to submit applications for customers who have categorical income verification.

- Contractors will have access to MyEnergy for the purpose of submitting and monitoring these applications.
- Contractors will also be able to see the applications of customers who have listed the contractor as the contractor of choice on their applications.
- Training in MyEnergy for contractors will take place:
  - March 15
  - March 26

### **Categorical eligible types:**

- HEAP (Home Energy Assistance Program)
- SNAP (Supplemental Nutrition Assistance Program/Food Stamps)/SNAP NYC
- SSI (Supplemental Security Income)- (this is different from Social Security Retirement or Disability benefits which are used as income sources for Standard Eligibility)
- TANF (Temporary Assistance for Needy Families)
- Weatherization Assistance Program
- Public Assistance

**Historically, EmPower+ has used 60% of State Median Income to determine income eligibility for low-income customers. The EE/BE order requires EmPower+ to use 60% Area Median income or State Median Income, whichever is greater.**

- The EmPower+ program will update the income qualification tables with these new numbers by March 15, 2026.
- TRC will start using the updated tables for qualification on March 18, 2026.
- If a customer who has previously applied and was classified as moderate income is now eligible as low income, their contractor can request that TRC rereview the application. If they now qualify as low-income, a new project will need to be created in NYHEP when the application is revised.

## PROJECT LEVEL INCENTIVE CAP UPDATES

- On March 18, 2026, the EmPower+ program will update the incentive caps for all projects submitted to the program that do not yet have a submitted work scope.
- The moderate-income incentive will cover 50% of the project cost up to the incentive cap (*example with IRA HEAR funding on next slide*)

	<b>Downstate LI</b>	<b>Downstate MI</b>	<b>Upstate LI</b>	<b>Upstate MI</b>	<b>Long Island LI</b>	<b>Long Island MI</b>
First unit	\$14,000	\$7,000	\$12,000	\$6,000	TBD	TBD
Unit 2-4 ea.	\$7,000	\$3,500	\$6,000	\$3,000	TBD	TBD

**For moderate income customers, EmPower+ will provide 50% of the cost of eligible measures up to the incentive cap. Incentive cap change from \$5,000 to: \$6,000 for Upstate customers and \$7,000 for Downstate customers**

- IRA HEAR funds will be layered on top of this amount of funding.

For example: The only eligible measure in the project is air sealing with a cost of \$4,000.

- Total cost: \$4,000
- Base EmPower+ incentive is \$2,000 (50% of \$4,000)
- IRA incentive is \$1,600
- Total possible incentive is \$3,600.

The EE/BE order classified light bulbs as a non-strategic measure that may continue in limited applications through 2027 and phased out afterwards.

As this is a **high cost/low savings measure with recent federal standards accelerating diminished savings opportunities**, there are limited applications where direct install lighting measures will save sufficient energy to justify the cost. Beginning March 18, 2026 eligibility for direct install lighting will be limited to:

- Replacement of existing in-service incandescent lightbulbs with LEDs, AND
- As part of a comprehensive project where lighting is under 5% of the total project cost.

## Recurring Stakeholder Engagement Opportunities

Event	Frequency	Link
Residential Market Advisory Group	Quarterly	resmarket@nyserda.ny.gov
Residential DAC Advisory Group	Bi-monthly	TBD
Home Modernization Program Update	Monthly	<a href="https://hpwescontractorsupport.com/sign-up-for-program-announcements-updates/">https://hpwescontractorsupport.com/sign-up-for-program-announcements-updates/</a>

## Pause for Questions

Clarity?

Context?

Concerns?



*Raise your hand, use the Q&A or email us at [equity@dps.ny.gov](mailto:equity@dps.ny.gov)*

# **NYSERDA LMI Multifamily Residential**

# Affordable Multifamily Program Upstate (AMP Up)

AMP Up provides end use incentives and integrated technical assistance for upstate affordable multifamily projects and replaces upstate AMEEP program.

## Program Eligibility

- North of Con Ed service territory
- Pay into electric or gas System Benefits Charge
- Mixed use buildings acceptable
- Project size at least 5 units
- Meet affordable housing definition – at least 25% of the households are at or below 80% AMI or SMI, whichever is higher

## Two pathways based on building typology

- **Low Rise Pathway**
  - For buildings up to 3 stories and up to 20 units
  - Incentive cap 85% of project costs
  - More even distribution of incentives across project lifecycle
- **Larger Building Pathway**
  - For buildings >3 stories or >20 units
  - Incentive cap 70% of project costs
  - Greater distribution of incentives at end of project lifecycle

## Concierge Service

- Provide Owner's Rep-level services for projects going through AMP Up
- Providers will be assigned to projects

## Multifamily Contractor Network

- Existing network of contractors that accepts applications on an ongoing basis
- Support projects going through program
- Building Owners/Managers can choose Provider they wish to work with

## Payments are milestone based

- There will be 4 payments over the course of the project lifecycle
  - Stage 1 – Scope of Work (SOW) Development
  - Stage 2 – Construction Initiated
  - Stage 3 – Partial Construction
  - Stage 4 – Construction Completed

## Funding is provided for measures installed and technical assistance

- Installed Measures - paid out \$/dwelling unit
  - Prescriptive
  - Weatherization
  - Electrification
  - Deep Energy Retrofit
  - Resilience Enhancement
- Technical Assistance cost share of approved TA budget
  - General (energy audit/assessment & SOW development)
  - Resilience Design Assistance

## TIMELINE & STAKEHOLDER ENGAGEMENT

Timing	Topic	Activity
Q1	Program Launch	Launch AMP Up by March 31st
	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar
Q2	Stakeholder Engagement	<ul style="list-style-type: none"> <li>Multifamily stakeholder roundtable to discuss AMP Up and technical assistance offerings</li> <li>Multifamily Contractor Network Quarterly Webinar</li> </ul>
Q3	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar
Q4	Stakeholder Engagement	Multifamily Contractor Network Quarterly Webinar
	Program Update	Review Program Manual and revise as needed for Q1 2027 update

# LMI Multifamily Technical Assistance

Technical assistance services for affordable multifamily including energy studies, on-site energy manager and Owner's Rep will be consolidated under the Flexible Technical Assistance (FlexTech) program.

## **Program Eligibility**

- Statewide
- Pay into electric or gas System Benefits Charge
- Mixed use buildings acceptable
- Project size is 5+ units
- Meet affordable housing definition – at least 25% of the households are at or below 80% AMI or SMI, whichever is higher

## End Use Incentive Technical Assistance

- Cost share up to 100% of approved budget provided the project shows construction initiated.
- Applicable for AMEEP and AMP Up projects
- Streamline TA offering with standardized process

## Custom Technical Assistance

- Standalone technical assistance projects
- Cost share up to 75% of approved budget. Building owner/manager contributes 25%.
- Building owner and Provider can customize scope of work within FlexTech

## TIMELINE & STAKEHOLDER ENGAGEMENT

Timing	Topic	Activity
Q1 – by March 31	Program Launch	Update FlexTech Program Opportunity Notice with EE/BE LMI MF TA details
Q2	Stakeholder Engagement	<ul style="list-style-type: none"> <li>• NYSERDA's Multifamily Contractor Network Quarterly Webinar – update LMI MF TA offerings</li> <li>• AMEEP Stakeholder Listening Session re: Material program design and Progress Updates</li> <li>• NYSERDA's Multifamily stakeholder roundtable re: AMP Up and TA offerings</li> <li>• FlexTech Consultant Quarterly Webinar</li> </ul>
Q3	Stakeholder Engagement	FlexTech Consultant Quarterly Webinar
Q4	Stakeholder Engagement	<ul style="list-style-type: none"> <li>• Contractor roundtable discussion</li> <li>• FlexTech Consultant Quarterly Webinar</li> </ul>

# Direct Injection

## DIRECT INJECTION

Direct Injection allocates LMI EE/BE funds to existing housing preservation programs administered by NYS Homes and Community Renewal (HCR) and NYC Housing Preservation and Development (HPD) to 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.

Additionally, the program provides dedicated technical assistance providers to work with project teams throughout the design and construction process.

## Programs

- HCR's Clean Energy Initiative (CEI)
- HPD's Resilient and Equitable Decarbonization Initiative: Existing Buildings Program (REDi: EB)

## Eligibility

- 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.

## Measure Eligibility

- Eligible program scopes combine heating electrification measures with building envelope measures to ensure that the projects deliver energy savings.

## Incentive Structure

- CEI and REDi programs both provide incentives using a \$/dwelling unit structure. See term sheets on each agency's respective program website for more detail on associated incentive amount and structure, by project scope and measure category.

## Stakeholder Engagement

- HCR and HPD staff continue to conduct recurring stakeholder engagement – roundtables, webinars, interviews, etc. – and regularly update their programs through the term sheets offerings.

## Timeline

- Eligible projects may apply to CEI and REDi programs on a rolling basis, subject to available funds.

# Affordable New Construction

Flexible early-stage design technical assistance to support the design community in developing & delivering high performance buildings

EE/BE funding for affordable multifamily

RGGI funding for market-rate multifamily and 1-4 unit homes

## **Program Eligibility**

- Statewide
- New Construction, substantial renovations, gut rehabilitations
- Residential buildings
- Projects in planning, concept, schematic, or design development phase

## **Timeline**

Launch ~Q2 2026

## Services Offered

Planning and design support:

- Integrated design & systems selection and sizing
- Energy modeling, load calculations, economic analysis
- Third party certification & sub-consultant design support
- Operation + maintenance preparation

Training for designers on high performance design

Market adoption support on external facing case studies and educational tools

## Incentive Structure

- \$/ Dwelling Unit for 1-4 unit homes
- \$/ sf for Low-rise and high-rise multifamily

Enhanced system commissioning and optimization beyond typical project commissioning to assist in buildings' long-term operation and maintenance.

EE/BE funding for affordable multifamily

RGGI funding for market-rate multifamily and 1-4 unit homes

## **Program Eligibility**

- Statewide
- New Construction, substantial renovations, gut rehabilitations
- Residential buildings
  - Single Family / Small Homes, Low-Rise MF, & High-Rise MF

## **Timeline**

Launch Q1 2027

## Services Offered

Enhanced Commissioning support:

- Building Baseline Energy Use Analysis and Discovery of issues
- Creating an Enhanced Commissioning Plan of performance verification and optimization
- Intervention work, seasonal Cx, troubleshooting systems, and re analysis

Training and ad hoc support for designers and building owners on operations, maintenance, and building management

Market adoption support on external facing case studies and educational tools

## Incentive Structure

- \$ / Dwelling Unit for 1-4 unit homes
- \$ / sf for Low-rise and high-rise multifamily projects

# DPS Stakeholder Event



Affordable Multifamily Energy Efficiency Program - AMEEP

# Agenda

- Implementation Schedule
- Overview
- Planned Budget
- Energy Efficiency
  - Program Changes
- Electrification
- Health and Safety

# Implementation Schedule – Q1 2026

- Schedule reflects key steps to "launch" AMEEP, including changes discussed in the LMI IP and to be identified in an updated Program Manual, Technical guides, and other program docs

Date	Implementation Activity
January	Coordination between Con Edison and National Grid to finalize AMEEP program documentation, including Program Manual and related Technical Guides
February	DPS Staff and Utility review of AMEEP Program Manual
	Stakeholder Listening Session – Key AMEEP Changes, Health & Safety data collection and pathway design feedback
	Market Communication: AMEEP Comprehensive and AMEEP-E incentive rates and design, PC&IP Webinar Invitation
March	AMEEP "Go-Live" and PC&IP Webinar – AMEEP Program Manual posted on respective Utility Websites, NYSERDA Affordable Multifamily resource page, and filed on DPS Document Matter Management (DMM)

# AMEEP Overview

- Administered jointly by Con Edison and National Grid
- Incentives for downstate Affordable Multifamily(5+ units) customers
- **35%** of total statewide LMI Portfolio budget authorization
- Program enhancements
  - Electrification incentives (AMEEP-E)
  - Weatherization interventions
  - Streamlined program processes
  - Improved coordination with NYSERDA Technical Assistance
  - Evaluating Health & Safety

Con Edison and National Grid plan to contribute

**58 Million LMMBtu-e**  
savings

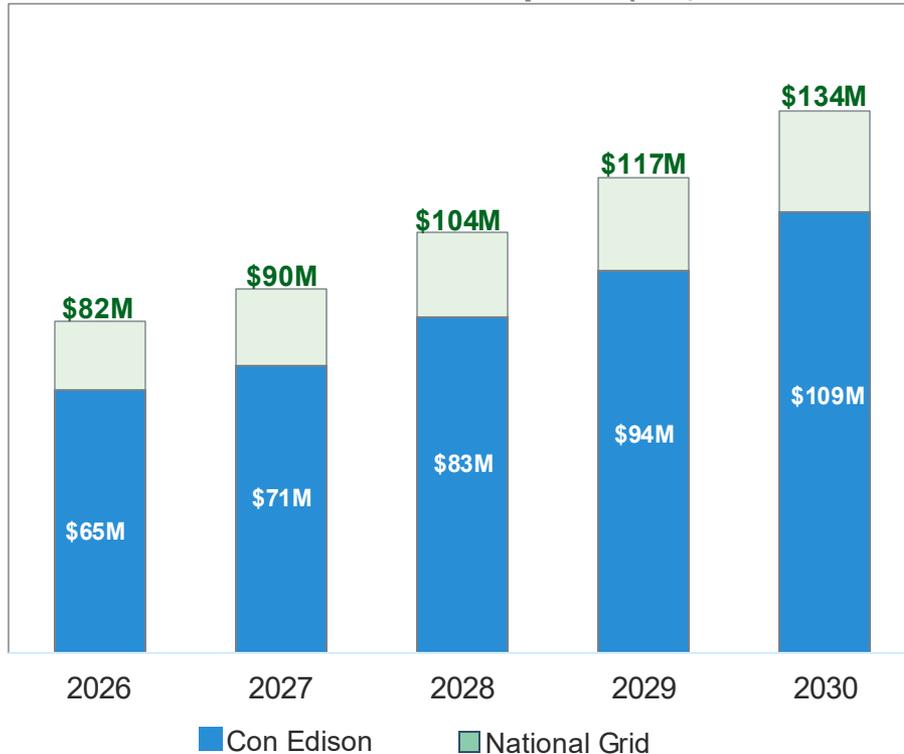


From upgrading

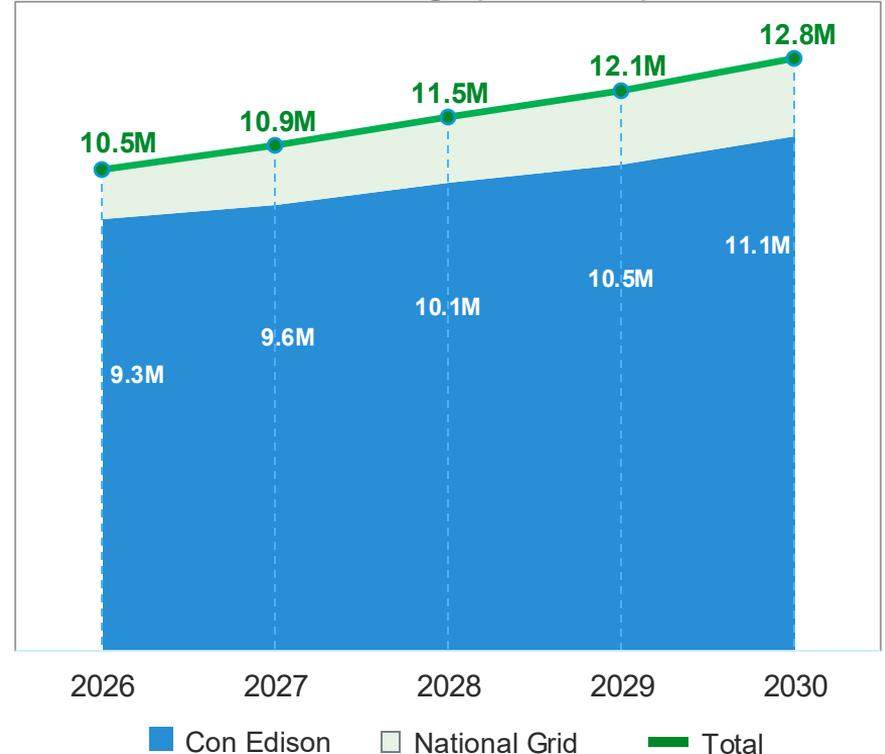
**954,000 Affordable Units**  
during EE-BE Period (2026-30)

# Planned Budget and Savings – Gas + Electric

Annual Spend (\$M)



Annual Savings (LMMBtu-e)



# Energy Efficiency

- Regulatory agreements with a housing agency, or
- Min 25% of units occupied by households below 80% AMI or SMI, whichever is greater

## Comprehensive Pathway

- Multiple-measure upgrades to facilitate whole building retrofits
- \$/dwelling unit incentives
- Higher incentives
- Points-based tiered incentive structure

## Non-Comprehensive Pathway

- Single measure upgrades
- Varying incentive structures (e.g., \$/ft of insulated pipe, \$/sq. ft. of roof space...)
- Helpful for buildings without financial reserves

# Program Changes

- Responding to direction from the LMI EE/BE Order and PC feedback, AMEEP PAs identified program design and administrative improvements to implement in 2026

## Key Objectives

- Modify measures offered to respond to EE/BE Order requirements (i.e., final Strategic Framework)
- Modify program design to right size incentives and program pathway structures to emphasize lifetime savings, measure cost and strategic intervention areas (e.g., weatherization)
- Introduce adjustments to Comprehensive Pathway structure and associated incentive rates
- Simplify program offering overall and streamline administrative processes to reduce project timelines and complexity of submitting/completing projects

# Electrification (1 of 2)

- Order authorized up to 15% of LMI program budgets for building electrification; AMEEP-E provides incentives to electrify space heating/cooling and domestic hot water

## Overview

- Existing AMEEP structure integration

## Eligibility

- Delivered fuel and active Con Edison electric account
- Not using NYSERDA funding

## Requirements

- Eligible measures include space heating, central HPWH, combined space and water heating
- Attic insulation required if not pre-existing
- Incentives capped at 85% of project cost
- No common area only
- No cost shift to tenants and demonstration of no net operating cost increase

# Electrification (2 of 2)

## Comprehensive Pathway

- Multiple-measure upgrades to facilitate whole building retrofits
- \$/dwelling unit incentives
- Higher incentives
- Points-based tiered incentive structure

- Added Tier for full load electrification, at a lower threshold
- Point value varies on other project measures (e.g. envelope)

## Non-Comprehensive Pathway

- Single measure upgrades
- Varying incentive structures (e.g., \$/ft of insulated pipe, \$/sq. ft. of roof space...)
- Helpful for buildings without financial reserves

- Full load electrification incentives
- \$/dwelling unit incentives

# Pre-Weatherization Health & Safety

- Pre-Weatherization Health & Safety (H&S) may include remediation of structural deficiencies or hazardous conditions that would otherwise prevent a building from participating in AMEEP

## Approach

- Con Edison and National Grid are working with subject matter experts to evaluate program design concepts
  - Engaging organizations and program administrators with prior experience (e.g., AEA, WAP)
  - Leveraging findings from existing programs (e.g., ComEd Multifamily, National Grid Single-Family)
- Data collection on H&S will continue throughout 2026
- Focused Stakeholder Listening Session 2/11 (this Wednesday)
- Initial findings and future plans to be included in 2026 LMI Implementation Plan

## Pause for Questions

Clarity?

Context?

Concerns?



*Raise your hand, use the Q&A or email us at [equity@dps.ny.gov](mailto:equity@dps.ny.gov)*

# **NYSERDA Workforce Development Programs**

## The NYS Public Service Commission authorized funding for NYSERDA's Workforce Development and Training Programs under its EE/BE Orders

**Program Budget: \$30M in LMI Portfolio and \$53M in Non-LMI Portfolio (\$83M in total)**

NYSERDA will deploy 2026-2030 EE/BE ratepayer funds across three (3) primary workforce development activities as part of both LMI and non-LMI portfolios.



**Clean Energy Career Pathways Training**



**Targeted Skills Training & Upskilling**



**“Earn as Your Learn” Wage Reimbursement & Retention Incentives**

## Program Updates

<p><b>On-the-Job Training / “Earn-as-You-Learn” Program</b></p> <p>Provides wage subsidies to employers hiring new workers for in-demand clean energy jobs.</p>	<p><b>Updates launched January 2026 Program accepting applications</b></p>
<p><b>Career Pathways Training</b></p> <p>Funded projects will provide new entrants with technical skills, supportive services, and job placement support to obtain their first clean energy job.</p>	<p><b>Funding opportunity for training organizations to launch ~March 2026</b></p>
<p><b>Targeted Skills Training &amp; Upskilling</b></p> <p>Funded projects will enhance the knowledge, skills and competencies required to help existing clean energy workers advance in their careers.</p>	<p><b>Funding opportunity for training organizations to launch ~March 2026</b></p>

## Workforce Assessment

### Objectives:

- Identify gaps in New York's EE/BE workforce and barriers to meeting workforce demand
- Identify priority occupations including pathways from training to career.
- Integrate perspectives from across the state's EE/BE ecosystem through surveys, listening sessions and interviews of a variety of stakeholders.
- Identify barriers to entry into the EE/BE workforce, especially for Disadvantaged Communities and Priority Populations, including availability of training programs and wraparound supports.
- Inform decision-makers of prospective partnerships and collaborative opportunities that can strengthen EE/BE workforce development for the state.
- Provide practical and actionable interventions in the workforce ecosystem, ensuring New York addresses near- and long-term EE/BE workforce needs and maximizes return on investment.

## Workforce Assessment

### Project Timeline

	2025	2026						
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
<b>Task 1:</b> Literature Review and Methodology Development								
<b>Task 2:</b> Landscape of Existing EE/BE Workforce and Workforce Development Infrastructure								
<b>Task 3:</b> Stakeholder Identification, Outreach, and Facilitation								
<b>Task 4:</b> Gap Analysis, Draft/Final Recommendations and Report								

### Engagement opportunities:

- **Research Methodology Discussion and Input session**
- Tuesday, February 10<sup>th</sup>, 12pm-1pm
- Email [winfo@nyserda.ny.gov](mailto:winfo@nyserda.ny.gov) to request meeting invitation
- **Surveys, interviews, facilitated workshops**
- Email [winfo@nyserda.ny.gov](mailto:winfo@nyserda.ny.gov) to be added to stakeholder contact list

## Pause for Questions

Clarity?

Context?

Concerns?



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# **NYSERDA General Awareness and Education**

## PROGRAM SERVICES HIGHLIGHTS, BY PROGRAM/INITIATIVE

### Regional Clean Energy Hubs

- Project management and coordination assistance
- Outreach and awareness
- Equitable engagement and regional capacity building
- Partnerships
- Translation services, applicable across NYSERDA programs

### Energy Equity Collaborative

- Engage additional DAC-representing organizations, expanding advisement and feedback through the Collaborative
- Technical assistance to support Working Groups in developing and executing Action Plans
- Facilitation of robust and consistent coordination among DAC representatives, NYSERDA, and state agencies

### DAC CONSULTANT POOL

Compensation for :

- participation in the Energy Equity Collaborative Steering Committee and Working Groups
- Residential DAC Advisory Group participation
- other high-impact program team engagement needs aligned with the overall EE/BE Portfolio

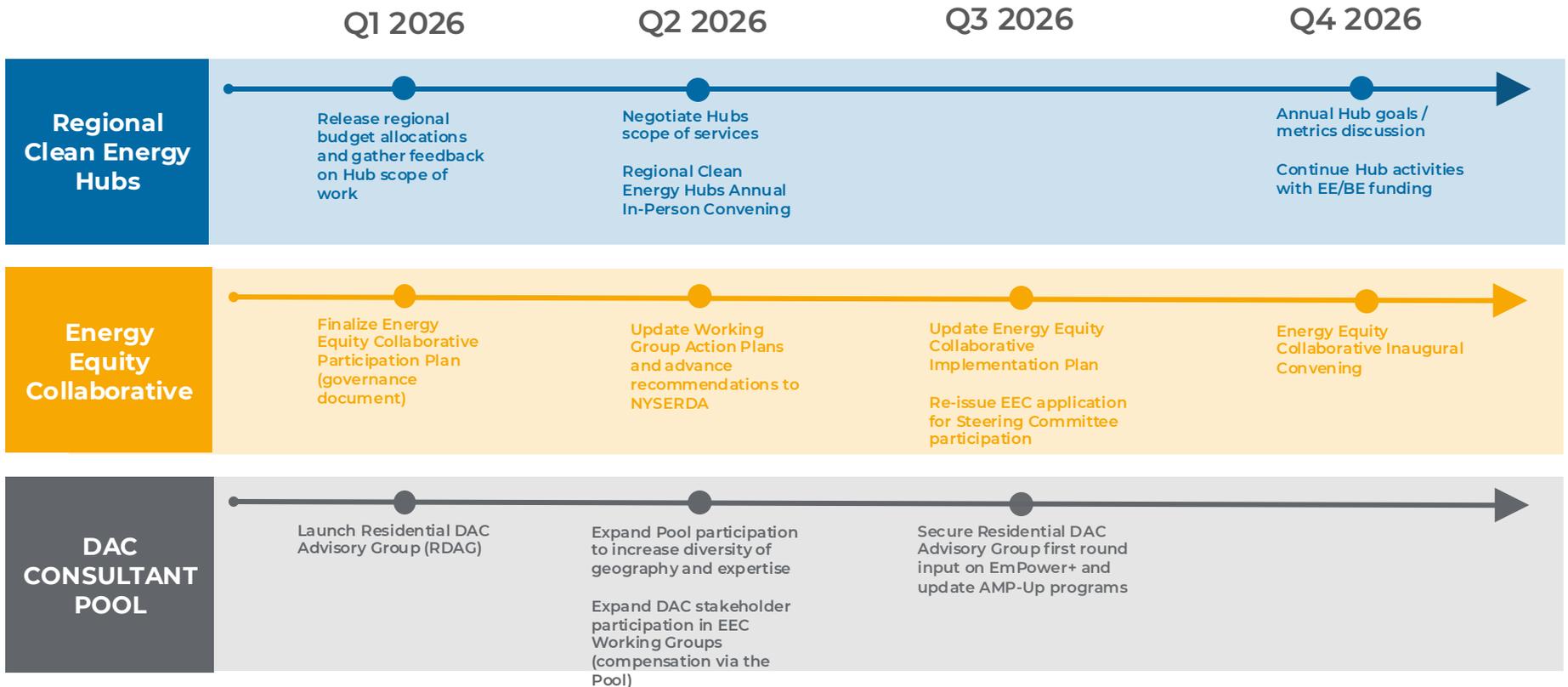
### Utility Coordination

- NYSERDA will facilitate and support **coordination between the Utilities, NYSERDA and DPS to support Hubs activities** relevant to pertinent program updates, outreach priorities, and resolution of customer concerns.
- Utility Program Administrators will be encouraged to coordinate with NYSERDA to **leverage the Residential DAC Advisory Group** to the extent practicable.
- DPS and NYSERDA will also **explore how to best leverage engagements via the Energy Equity Collaborative**, including annual convenings and Steering Committee and/or Working Group meetings to facilitate stakeholder engagement.

## PLANNED STAKEHOLDER ACTIVITIES AND VENUES

Program / Initiative	Engagement Activities	Description of Stakeholder Attendees
<b>Regional Clean Energy Hubs</b>	Monthly Informational Webinars, Hub All Staff meetings, Hub Leadership meetings, Individual Hub Monthly Check ins, Working Group meetings, Hub Marketing Salesforce and Home Modernization Office Hours, Hub Agenda Setting Committee meetings, Annual Planning Committee meetings	Hub network staff, NYSERDA management and program teams, Technical Support Contractor staff, invited guests
<b>Energy Equity Collaborative</b>	Monthly Working Groups meetings, quarterly Steering Committee meetings, annual convening, hosted webinars	DAC-representing organizations participating in the EEC Steering Committee and EEC Working Groups (contracted through the DAC Consultant Pool)
<b>Residential DAC Advisory Group (planned utilization of DAC Consultant Pool)</b>	Full Advisory Group meetings and meetings convened for two program-specific subgroups	DAC-representing organizations participating in the Residential DAC Advisory Group (contracted through the DAC Consultant Pool, with potential exception of key orgs contracted via Direct Contract outside of the Pool)

# 2026 IMPLEMENTATION SCHEDULE AND MILESTONES



NOTES: To facilitate continuous information sharing, Working Group meetings, webinars, and intra-program/intra-initiative meetings are held monthly; EE/BE LMI Implementation Plan revisions will be submitted as needed and in alignment with broader NYSERDA schedule.

## FOR REFERENCE: HIGH-LEVEL BUDGET

### DAC ENGAGEMENT - Total: \$44M

<b>Program / Initiative</b>	<b>Budget Allocation</b>
Regional Clean Energy Hubs	\$42,200,000
Energy Equity Collaborative Implementation Support	\$800,000
DAC Consultant Pool (formerly DAC Stakeholder Services Pool)	\$1,000,000
<b>Total</b>	<b>\$44,000,000</b>

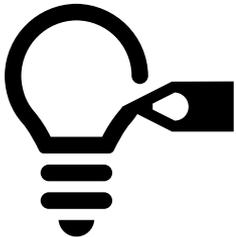
*NOTE: All programs/initiatives included in the budget are intended to run for the entirety of the 2026 to 20230 funding period.*

## Pause for Questions

Clarity?

Context?

Concerns?



*Raise your hand, use the Q&A or email us at [equity@dps.ny.gov](mailto:equity@dps.ny.gov)*

# Performance Management and Future Engagement

# 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
- Stakeholder Engagement
  - Program specific engagement led by program administrators
  - Overall portfolio level engagement led by DPS staff
- Considerations
  - Balancing burden of reporting and measurement; consistency with Non-LMI
  - Method and timing of measurement (program metrics vs. studies)
- Performance Management Framework
  - Blueprint for the performance management process for the LMI Portfolio
  - Specifics on data and reporting to be outlined in Staff Guidance Documents



# DPS-Led Engagement on LMI EE/BE Portfolio

## Quarterly Meetings

- Review program performance and activities.
- Discuss challenges & opportunities.
- Open space to discuss emerging issues.
- Two in-person meetings (one downstate, one upstate)
  - In person meetings to provide more opportunity to workshop issues

## Complementary Activities

- Streamlined access to information on program performance (webpage, email digests, infographics)
- Support for finding information on program performance (e.g.: in DMM)
- Coordination and information sharing (e.g. topic-specific meetings and discussions).

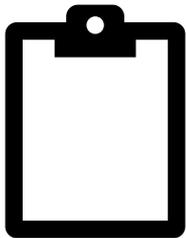
# Key Takeaways from Stakeholder Engagement To Date

- Portfolio filings are not easily accessible and difficult to consume.
- Program performance data is not digestible, reliable, or accessible.
- Additional metrics and outcomes are needed at program and portfolio levels.
- Ongoing stakeholder engagement around the portfolio should be multi-modal, timely, digestible, proactive, and direct to stakeholders.
- Stakeholder feedback provided directly to programs is opaque and without clear delineation for all the respective channels and outcomes.
- Staff are exploring the many suggestions and opportunities stakeholders posed to address these issues.

# Quarterly Performance Management Meetings Commence mid-April

Agenda to include:

- Review of performance of LMI EE/BE programs
- Improving transparency and usefulness of stakeholder feedback
- Specific policy/program topics, emerging issues



SURVEY: Topics for PMF Meeting Agendas & Webinar Feedback  
(Deadline March 2<sup>nd</sup>, 2026)

<https://forms.office.com/g/iE1X3LR1DL>



**Department  
of Public Service**

**Thank you for participating!**

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