



**Department
of Public Service**

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



Department
of Public Service

QUARTERLY FORUM

LOW- TO MODERATE-INCOME ENERGY EFFICIENCY AND BUILDING
ELECTRIFICATION PORTFOLIO

JULY 29, 2026

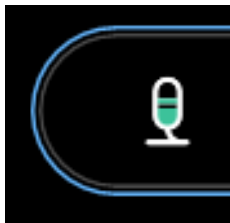
HOUSEKEEPING

- Run time: 10:00AM-3:00PM
- Participants are muted upon entry.
- Chat is enabled for participating in discussions, but hosts 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

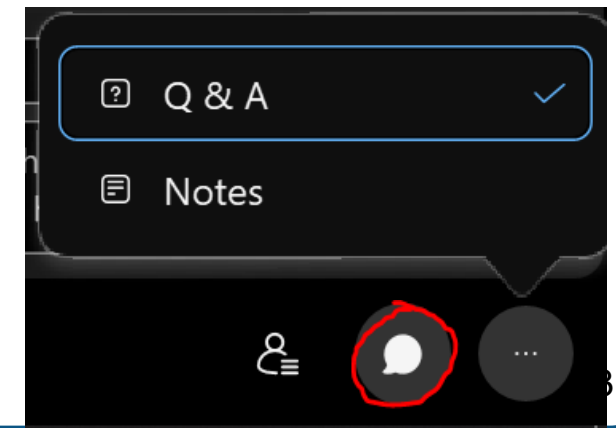
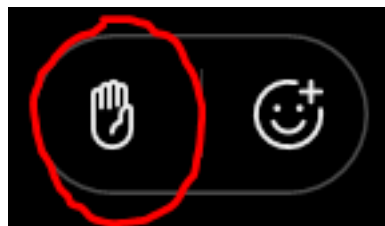
Muted



Unmuted



Raise Hand



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.

GOALS FOR TODAY

1. Provide program and policy updates relevant to the LMI EE/BE portfolio
2. Discuss LMI EE/BE performance and trends
3. Identify & discuss emerging issues related to the LMI market segment
4. Contextualize broader NYS energy efficiency and building electrification landscape beyond the systems benefit charge



What would you like to get out of these meetings? Let us know at Equity@dps.ny.gov

TODAY'S AGENDA

- 10:00 am – Welcome and Introductions
- 10:15 am – Relevant Program and Policy Updates
- 11:00 am – Panel: Q1 Performance of LMI EE/BE Portfolio
- 12:15 pm – Lunch Break
- 1:00 pm – Electrification within the LMI Market Segment
- 2:15 pm – Serving Customers that do not contribute to the Systems Benefit Charge (SBC)
- 3:00 pm - Adjourn

There is room for discussion throughout today's agenda.

PROGRAM AND POLICY UPDATES

LMI EE/BE UPDATES

- Reporting, scorecard updates
 - Template revised and filed June 30, 2026
 - Quarterly reports to be filed on August 31, 2026, shall include both the Q1 and Q2 performance data.
 - DPS Staff finalizing guidance on supplemental reporting, pursuant to LMI EE/BE performance management framework
- DAC Weatherization Tech Conference (June 16, 2026)
 - Highlighted challenges such as pre-existing building conditions, administrative complexities, contractor capacity, and effectively engaging diverse residents.
 - Meeting materials filed in DMM 25-M-0248 and 25-M-0249
- Customer Referral Plan
 - Compliance letter filed June 18, 2026
 - Refocuses utility referral efforts to EmPower+ towards targeted electronic outreach
 - Revised plan expected in August
- Updated [LMI Implementation Plan](#) filed June 1, 2026; under Staff review

2026-2027 BUDGET LAW (SELECT EXCERPTS)

- Requires the PSC to establish an Excelsior Power Program that would reduce peak energy demand through remote operation of smart thermostats or other smart devices. Appropriates \$33 million for this program to provide \$25 monthly bill credits.
- Reappropriates \$50 million to provide an energy affordability guarantee to low-income residential customers electrifying through the EmPower+ program.
- Additions to Public Service Law, requiring: utilities to submit an annual affordability index that shows the energy burden of its residential customers, and for the index to be referenced when proposing rate modifications; the Commission to issue an annual affordability report; and provide the Commission with ability to install an affordability monitor within a utility when energy burdens exceed the goal.
- Affordable utilities omnibus legislation includes several provisions related to utility oversight and modifications to utility rate case process
- Establishes the RATES commission to study the causes and origins of rising utility rates and to recommend any actions or reforms to reduce such rates.

2026-2027 BUDGET LAW (SELECT EXCERPTS)

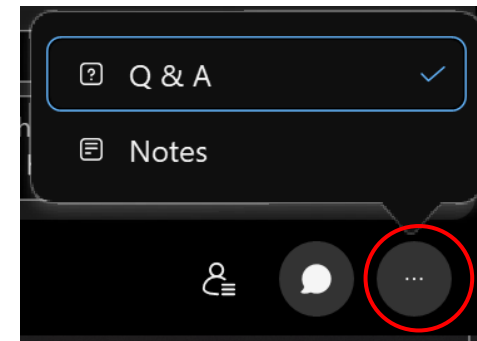
- Sustainable Future Program (\$1B reappropriated + additional \$1B), including:
 - \$150M to EmPower+ (NYSERDA)
 - \$50M for Clean Green Schools Program (NYSERDA)
 - \$150M for thermal energy network projects at public, municipal and state-owned buildings including SUNY and CUNY
 - \$150M in support of emission reductions programs administered by Homes and Community Renewal (HCR)
 - Up to \$75M for zero emission transportation
 - \$200M for NY-Sun and \$100M for NYPA renewable energy projects
- Green Affordable Pre-Electrification Program (GAP)
 - \$3M appropriation to HCR for the purpose of funding green rehabilitation projects necessary for code compliance or participation in local, state, or federal programs

DISCUSSION



- Clarification?
- Comments?
- Concerns?

Please use Q&A feature or raise your hand to share verbally.



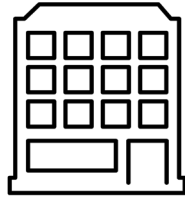
Q1 2026 PERFORMANCE

PROGRAM ADMINISTRATOR PANEL DISCUSSION



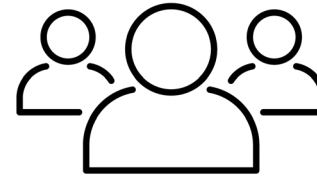
1-4 Family Residential

- Courtney Moriarta (NYSERDA)
- Scott Oliver (NYSERDA)



Affordable Multifamily

- Michael Reed (NYSERDA)
- Pamela Miller (NYSERDA)
- Maria Cangiano (NYSERDA)
- Sam Pastrick (Con Edison)
- Sam Howe (National Grid)



General Awareness & Education

- Anzala Alozie (NYSERDA)
- Michael DiRamio (NYSERDA)
- Andrew Neufeld (NYSERDA)



Workforce Development

- Laura Giannini (NYSERDA)
- Adele Ferranti (NYSERDA)

LUNCH BREAK

Agenda resumes at 1:10 pm

Coming Up:

LMI Electrification

Serving Non-SBC Customers

ELECTRIFICATION WITHIN THE LMI MARKET SEGMENT

OPPORTUNITIES AND CHALLENGES RELATED TO LMI ELECTRIFICATION

- Energy affordability and decarbonization for LMI households are co-equal priorities
- Upfront costs and potential for increased operating expenses present barriers to scaling adoption
 - Program budgets are finite, however LMI electrification projects require more comprehensive work scopes (including weatherization, structural deficiencies, health and safety) and significant subsidy
 - Bill savings can vary from project to project, with delivered fuels and electric resistance conversions more likely to result in bill savings and conversions from natural gas resulting in limited savings or increased heating costs
- Knowledge gaps, limited data currently available to help inform electrification strategies
 - All-in project costs, operating expenses, strategies by various housing typologies
- Holistic solutions are necessary to support LMI electrification
 - Bill assistance, packaged solutions (solar, demand response), consideration for rate design, housing/submetering regulations, etc

CURRENT LMI ELECTRIFICATION WORKSTREAMS

Programs

- Standard offer incentives and technical assistance to support electrification projects in small homes and multifamily buildings

Pilots/Demonstrations

- Smaller scale initiatives designed to test feasibility, collect learnings, and inform policy and program design and implementation

Studies

- Issue specific research, modeling, and analysis to inform policy and program design and implementation

Interagency Coordination

- Work to align policies and program design across program administrators and agencies to reduce barriers to electrification and drive affordability for LMI households

MAY 2025 LMI EE/BE ORDER- ELECTRIFICATION CONSIDERATIONS

- Order outlines guiding principles for LMI Electrification:
 - **Prioritize Weatherization and Energy Efficiency:** Homes or buildings receiving ratepayer-funded subsidies for heat pump solutions **must be weatherized and undertake necessary energy efficiency upgrades first**; pre-electrification requirements are outlined in program implementation plans
 - **Focus on Energy Affordability:** Program Administrators (PAs) must **assess the energy affordability implications** of heat pump installations, ensuring that overall energy costs for the household do not increase as a result. If costs are projected to rise, the project should not proceed.
 - **Target Delivered Fuels Customers:** PAs should **prioritize the conversion of delivered fuel customers** (e.g., those using oil) to maximize energy affordability benefits for LMI customers.
 - **Align Programs and Policies:** State-level programs and policies, such as the Energy Affordability Program (EAP) and the Home Energy Assistance Program (HEAP), must be aligned to support LMI electrification. Policies to limit cost-shifts from building owners to tenants and align submetering with electrification policies should also be advanced.
- 15% of LMI EE/BE program budgets to support LMI electrification

LMI ELECTRIFICATION WORKSTREAMS

Programs

- LMI EE/BE Programs
 - EmPower+, administered by NYSERDA
 - Affordable Multifamily Energy Efficiency Program (AMEEP), administered by Con Edison and National Grid
 - Affordable Multifamily Program Upstate (AMP Up), administered by NYSERDA
- PSEG LI Home Comfort
- NYS Homes and Community Renewal
 - All-Electric Multifamily Program (AMP)
 - Green Small Buildings Program (GSBP)
 - Clean Energy Initiative (CEI)
 - Green Affordable Electric Program (GAP)
 - Weatherization Program
- New York City Housing Preservation and Development- REDI
 - HPD and NYSERDA initiative to streamline access to financial and technical assistance to electrify 5+ unit buildings

Pilots and Demonstrations

- Clean Heat for All (NYSERDA)
 - NYSERDA investment in product development and field demonstrations to advance practical pathways for electrify multifamily buildings
 - Initially focused on window heat pumps, expanded to through-wall heat pumps
 - Performance data collected will build market confidence and drive broader adoption
- Energy Affordability Guarantee (DPS, in coordination with NYSERDA and electric IOUs)
 - Ensure low-income customers that fully electrify through EmPower+ maintain an energy burden of 6%
 - Monthly assessment of electricity bills for participants
 - Billing data and energy burden details to inform longer term strategies to electrify while addressing affordability
- Cost Shift Prevention REV Demonstration (Con Edison)
 - Demonstrate effective models for preventing cost shifts to tenants or building owners
 - Enhance existing market tools for project site identification
 - Gain insights on operating costs

Studies

- Study on solutions to cost-shifting in multifamily buildings (NYSERDA)
 - exploring technical and policy options for mitigating potential cost shift associate with electrification

Interagency Coordination

- Alignment of state-level programs and policies to increase impact of public funds and support electrification in LMI projects
 - Coordination on electrification requirements and incentive levels to avoid confusion
 - Alignment of Energy Affordability Program (EAP), Enhanced Energy Affordability Program (EEAP) and the Home Energy Assistance Program (HEAP) to consider electrification in benefit calculations
 - Potential solutions for electrification in emergency- no heat situations
 - Policies to limit cost-shifts from building owners to tenants
 - Alignment of submetering regulations with electrification policies

LMI ELECTRIFICATION IN OTHER JURISDICTIONS

New Jersey

- Multifamily Retrofit Initiative for Sustainability and Equity (M-RISE)
 - Includes technical assistance and incentives for heating/cooling including through electrification, insulation, windows, and appliances

California

- Equitable Building Decarbonization (EBD) Direct Install Program
 - Launched in spring of 2026; funded at \$432.5M, with a focus on improving access to comprehensive retrofits for low-income, disadvantaged and tribal communities
 - Delivered through a network of community-based organizations
 - Includes envelope improvements, electrification, and wiring/panel upgrades

Philadelphia

- Built to Last (BTL) Program
 - Demonstrates how a locality can coordinate fragmented funds and programs into a streamlined whole-home delivery model and bridge gap in programs for home repairs and energy upgrades
 - Eligibility set at 80% of Area Median Income, 340 homes served between 2023-2025

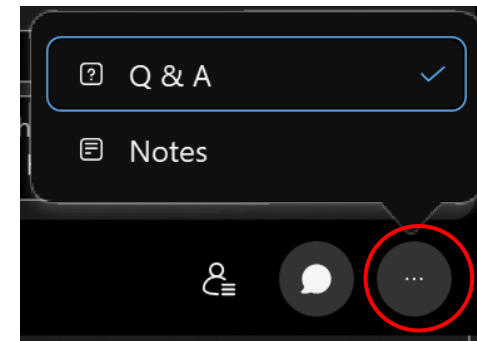
Are there other programs that we should be looking at?

DISCUSSION



- Clarification?
- Comments?
- Concerns?

Please use Q&A feature or raise your hand to share verbally.



SERVING NON-SBC CUSTOMERS

SYSTEMS BENEFIT CHARGE (SBC)

- In 1996, the New York State Public Service Commission (PSC) established a System Benefits Charge (SBC) to fund public policy initiatives not expected to be adequately addressed by New York's competitive electricity markets.
- Collected via a surcharge on customers volumetric usage of investor-owned, PSC-regulated electric and gas utilities.
- Energy efficiency programs have changed substantially since the establishment of the SBC through subsequent portfolios to align with legislation and evolve in scope and focus, including specific programs aimed at building electrification.
- Customers that do not contribute to the SBC through their electric or natural gas bills are unable to participate in SBC-funded programs.
- Open Data NY utility service territory maps: [Electric](#) | [Gas](#)

SERVING NON-SBC CUSTOMERS PANEL

Samantha Pearce, NYS Homes and Community Renewal

Alex Valentino, PSEG Long Island

Michael Lyons, Municipal Electric Utilities Association of New York State

- Available offerings
- Distinctions between SBC and non-SBC programs
- Gaps and opportunities to coordinate
- Where to connect for more info



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Low to Moderate Income Programs

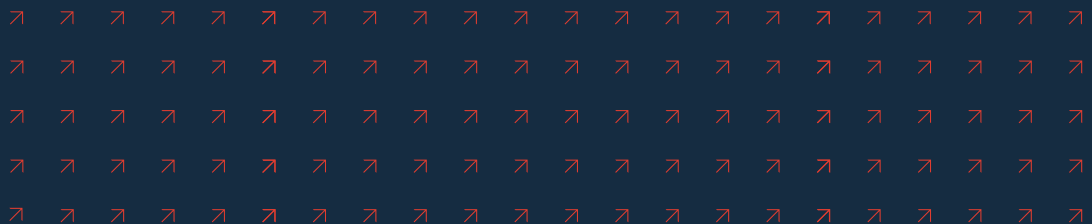
July 29, 2026





2026 Low to Moderate Income Programs

- Residential Energy Affordability Partnership (REAP)
- Heat Pumps Rebates
- Weatherization Rebates
- Heat Pump Water Heater Rebates
- Residential EV Charger Rebate (Level 2)
- Household Assistance Rate
- Energy Affordability Guarantee Pilot
- Coordination on other programs



Low to Moderate Income Eligibility

2026 Low-to-Moderate Income Eligibility - Aligns with NYSERDA Empower+

The current low-income guidelines for 2026 are set at 60% of area median income. These guidelines are in effect as of 5/15/2026.		
Household Size	Maximum Gross Annual Income	Maximum Gross Monthly Income
1	\$69,263	\$5,772
2	\$79,163	\$6,597
3	\$89,063	\$7,422
4	\$98,925	\$8,244
5	\$106,875	\$8,906
6	\$114,788	\$9,566
7	\$122,700	\$10,225
8	\$130,613	\$10,884
9	\$138,495	\$11,541
10	\$146,409	\$12,201

The current moderate-income guidelines for 2026 are set at 80% of the area median income. These guidelines are in effect as of 5/15/2026.		
Household Size	Maximum Gross Annual Income	Maximum Gross Monthly Income
1	\$92,350	\$7,696
2	\$105,550	\$8,796
3	\$118,750	\$9,896
4	\$131,900	\$10,992
5	\$142,500	\$11,875
6	\$153,050	\$12,754
7	\$163,600	\$13,633
8	\$174,150	\$14,513
9	\$184,660	\$15,388
10	\$195,212	\$16,268

Program Spotlight - REAP

Residential Energy Affordability Partnership Program - REAP

- **What is REAP?**
 - Income eligible program for PSEG Long Island residential customers
 - **Free** Home Energy Assessment conducted by BPI Certified technicians
 - Direct Install Measures (LED Lighting, Water Conservation, Door Sweeps, Attic Hatch Insulation, Pipe Insulation, Smart Thermostats) **at no cost**
- **REAP Customer Education:**
 - “Kitchen Table Talk” – REAP technician discusses energy savings behaviors with the customer and identifies other PSEG Long Island rebate opportunities for energy improvements (space heating and building envelope upgrades)
 - Direct Marketing Mailers & Comprehensive customer education folder

Program Spotlight - REAP

Residential Energy Affordability Partnership Program - REAP

- **Other REAP benefits:**
 - \$50 Bill Credit for all participants
 - \$35 Voucher for the PSEG Long Island Marketplace purchases
 - Free Shipping for \$35 and over order
- **REAP Outreach Efforts:**
 - Presentations, Meetings, Tabling events at locations like:
 - Senior Centers
 - Libraries
 - Churches
 - Club Meetings
 - Healthcare Fairs
 - Community Partnership Program Events

**Annual REAP Energy Forum
for Advocates!**



Program Spotlight - REAP

REAP Energy Forum for Advocates

- **Presenters:**
 - PSEG Long Island
 - Island Harvest
 - Community Development Program Long Island – Weatherization Assistance Program
 - United Way of Long Island – Project Warmth
 - Health & Welfare Council of Long Island
 - Veterans Administration
 - Department of Social Services
 - National Grid
 - Legal Services of Long Island

**2026 REAP Forum –
November 6th!**

Program Spotlight - REAP

Residential Energy Affordability Partnership Program -REAP

- REAP Outreach Efforts:
 - Jan-June 2026 REAP Outreach Efforts

2026 Q1 & Q2 Outreach Efforts	
Outreach Type	Occurences
Presentations	19
Tabling Event	71
Email/Mailing	507
Marketing Material - In-Person Drop-Offs	20
Total	597

Program Spotlight - REAP

REAP Energy Forum for Advocates

- Annual Event to bring together Program Team, Neighboring Assistance Programs, and Low-Income Community Advocates

- Educate Low-Income Community Advocates on the resources available to Low-Income Long Islanders to help reduce their energy usage, energy bills, and improve the health of their home
- Additional education provided on topics like, legal services, food pantries, temporary assistance, and more!

Purpose

Collab

- Bring together the PSEG Long Island programs and other neighboring programs and explore ways to work together
- Spread program awareness related to all helpful resources

Program Spotlight - REAP

REAP – Direct Install Measures & Audits Progress

- Installed Measures and Audits Completed 2020-2025

REAP Installed Measures 2020-2025					
End Year	LED Lighting	Appliances & Power Strips	Water Conservation	Smart Thermostats	Weatherization
2020	18,276	2,022	854	-	-
2021	21,962	2,727	922	-	-
2022	26,516	3,236	942	75	-
2023	20,250	2,772	942	1,222	-
2024	18,066	4,230	1,010	1,389	24
2025	21,657	2,873	3,934	1,144	1,044
Grand Total	126,727	17,860	8,604	3,830	1,068

REAP MMBTUs 2020-2025					
End Year	LED Lighting	Appliances & Power Strips	Water Conservation	Smart Thermostats	Weatherization
2020	967	1,397	674	-	-
2021	1,922	2,097	628	-	-
2022	2,758	2,342	471	437	-
2023	2,038	2,286	536	7,278	-
2024	2,174	2,445	705	6,973	5
2025	3,452	1,656	1,605	6,501	872
Grand Total	13,311	12,223	4,619	21,188	877

REAP Audits 2020-2025	
End Year	Audits Completed
2020	1,183
2021	1,593
2022	2,010
2023	1,652
2024	1,635
2025	3,008
Grand Total	11,081

Program Spotlight – Space Heating

Heat Pumps

- Whole Home Space Heating solutions to achieve clean, comfortable, home heating while reducing fossil fuel use

Measures:

- Cold Climate Air Source Heat Pumps
- Geothermal Ground Source Heat Pumps
- Air to Water Heater Pumps

Moderate Income Rebate (ccASHPs) → *\$5,000/Dwelling

- Income Eligibility screening required

Low Income Rebate (ccASHPs) → *\$7,500/Dwelling

- Income Eligibility screening required

*Subject to project cost caps

Program Spotlight – Space Heating

Home Comfort

- Low to Moderate Income Whole Home Dwellings Served 2020-2025

Low to Moderate Income Whole House Heat Pumps 2020-2025					
End Year	Dwellings	Customer Rebates	Contractor Incentives	MMBTUs	
2020	1	\$ 2,850	\$ 500	11	
2021	45	\$ 499,410	\$ 22,500	2,230	
2022	239	\$ 4,215,812	\$ 119,000	13,741	
2023	783	\$ 14,552,149	\$ 416,000	58,846	
2024	986	\$ 9,327,145	\$ 585,000	61,312	
2025	1,679	\$ 15,726,394	\$ 1,014,500	99,199	
Grand Total	3,733	\$ 44,323,760	\$ 2,157,500	235,339	

- Dwellings became key focus from 2022 into 2023
- Partial House Heat Pump solutions were still available through mid-2022

Program Spotlight – Building Envelope

Home Performance → Weatherization

- Building Envelope solutions to reduce drafts, improve comfort, maintain indoor temperature, and decrease energy loss

- **Free** Home Energy Assessments conducted by Building Performance Institute certified Partners

Measures:

- Air Sealing, Insulation, Duct Sealing, Windows

Moderate Income Rebate (Per Project Cap) → \$5,000

- Income Eligibility screening required

Low Income Rebate (Per Project Cap) → \$8,000

- Income Eligibility screening required

2026 Building Envelope Per Measure Rebates			
Eligible Measures	Moderate Income Rebate		Low Income Rebate
Insulation	\$	3,125	\$ 5,200
Air Sealing	\$	1,250	\$ 2,000
Duct Sealing	\$	625	\$ 800
Windows*	\$	4	\$ 8

*Rebate is per Sq Ft

Program Spotlight – Building Envelope

Home Performance→ Weatherization

- Low to Moderate Income Building Envelope Projects 2020-2025

Low to Moderate Income Building Envelope Projects 2020-2025					
End Year	Projects	Customer Rebates		Contractor Incentives	MMBTUs
2020	307	\$	1,139,047	\$ -	6,262
2021	455	\$	1,738,951	\$ -	7,195
2022	348	\$	1,416,702	\$ -	5,860
2023	343	\$	1,772,627	\$ -	6,653
2024	447	\$	2,392,680	\$ -	8,139
2025	718	\$	3,748,391	\$ 54,250	12,741
Grand Total	2,618	\$	12,208,398	\$ 54,250	46,851

Program Spotlight – Household Assistance Rate

- Provides a bill credit on every electric bill for customers who receive benefits from certain non-utility income-based programs
- Eligible residential customers can receive a monthly discount of \$45 or more per month on every bill.

Program Spotlight – Energy Affordability Guarantee (EAG) Pilot

- Administered by DPS
- Limit total household electricity costs to $\leq 6\%$ of annual income
- Supports electrification and energy affordability for LMI with heat pump and heat pump water heaters installations
- Must be enrolled in NYSERDA's Empower+ program

Coordination on Other Programs

- Project Warmth:
 - Administered by United Way Long Island
 - Provides one-time grant to help LMI customers pay heating costs
- National Grid
 - Coordinate on gas leaks during REAP audits
- Long Island Regional Clean Energy Hub
 - Connect LMI customers to free services and targeted incentives



 Thank
you

INDEPENDENT ENERGY EFFICIENCY PROGRAM

LMI EE/BE Quarterly Forum

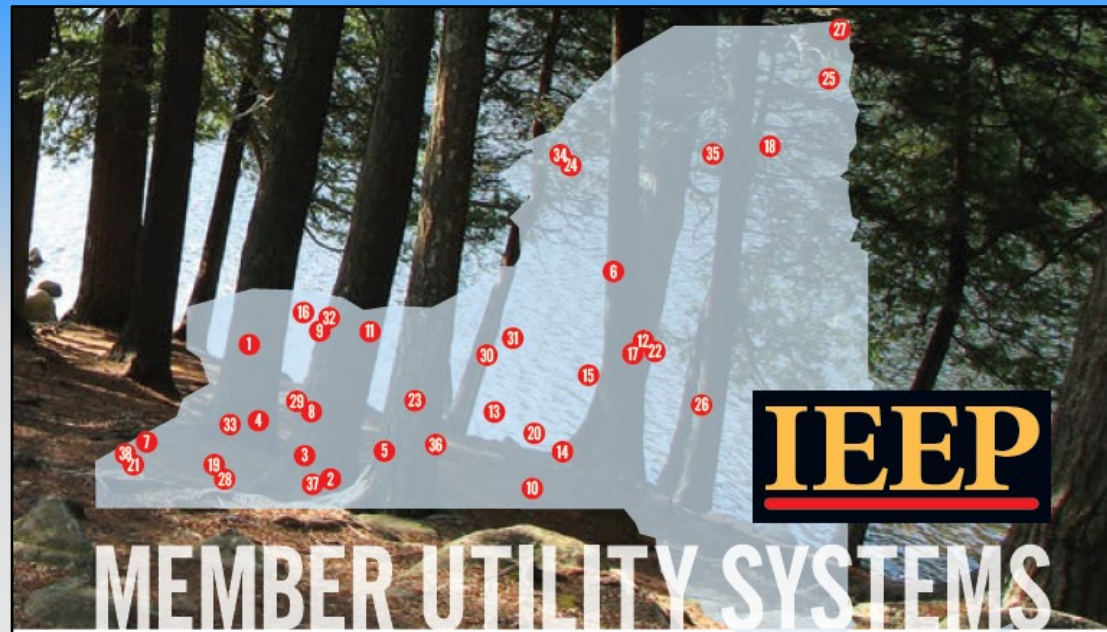
July 29th 2026



IEEP Overview

- 38 Members with 110,000 customers
- \$55 Million invested on energy efficiency projects since 2001
- \$3-5 Million invested annually
- The IEEP maintains individual budgets for each system and all funds collected for that system remains within that system





MEMBER UTILITY SYSTEMS

1 VILLAGE OF AKRON	14 VILLAGE OF GROTON	26 VILLAGE OF RICHMONDVILLE
2 VILLAGE OF ANDOVER	15 VILLAGE OF HAMILTON	27 VILLAGE OF ROUSES POINT
3 VILLAGE OF ANGELICA	16 VILLAGE OF HOLLEY	28 CITY OF SALAMANCA
4 VILLAGE OF ARCADE	17 VILLAGE OF ILION	29 VILLAGE OF SILVER SPRINGS
5 VILLAGE OF BATH	18 VILLAGE OF LAKE PLACID	30 VILLAGE OF SKANEATELES
6 VILLAGE OF BOONVILLE	19 VILLAGE OF LITTLE VALLEY	31 VILLAGE OF SOLVAY
7 VILLAGE OF BROCTON	20 VILLAGE OF MARATHON	32 VILLAGE OF SPENCERPORT
8 VILLAGE OF CASTILE	21 VILLAGE OF MAYVILLE	33 VILLAGE OF SPRINGVILLE
9 VILLAGE OF CHURCHVILLE	22 VILLAGE OF MOHAWK	34 VILLAGE OF THERESA
10 VILLAGE OF ENDICOTT	23 VILLAGE OF PENN YAN	35 VILLAGE OF TUPPER LAKE
11 VILLAGE OF FAIRPORT	24 VILLAGE OF PHILADELPHIA	36 VILLAGE OF WATKINS GLEN
12 VILLAGE OF FRANKFORT	25 CITY OF PLATTSBURGH	37 VILLAGE OF WELLSVILLE
13 VILLAGE OF GREENE		38 VILLAGE OF WESTFIELD

IEEP Rebate Programs

Rebates available for;

- **Insulation and Air Sealing**
- **Cold Climate Heat Pumps and Heat Pump Water Heaters**
- Energy Star Appliances
- Battery Powered Yard Care Equipment
- LED lighting upgrades for commercial customers



Residential Insulation Program



INSULATION PROGRAM

The Independent Energy Efficiency Program (IEEP) is sponsoring this program to encourage participating municipal utilities' residential electric customers to invest in the comfort and efficiency of their homes. Insulation and air sealing work hand in hand to save energy, money, and to increase the comfort of your home. Annually, each residential electric customer of participating Municipal Electric Utilities is eligible for one (1) incentive payment up to 75% of the cost up to a maximum IEEP incentive of \$5,000 of the installation expense incurred. Eligible measures include: Attic insulation, exterior wall insulation, rim joist insulation, basement crawl space insulation, air sealing, weatherstripping, duct insulation, and ventilation. All projects must be pre-approved by the IEEP in order to be eligible.

For pre-approval, please submit this completed form, a copy of your electric bill, and a detailed scope of work from your selected insulation contractor clearly listing all work and costs listed separately. The IEEP will return a pre-approval authorization and then the work can commence.

Once the work is completed and to receive your incentive, please submit this form and mail it to the address below along with:

- ▶ This completed and signed form along with your IEEP Pre-approval number.
- ▶ A detailed copy of your dated invoice or installation contract showing proof of payment.
- ▶ A copy of your municipal utility electric bill that matches where the work was completed.

Mail to: IEEP Rebate Program, P.O. Box 2489, Syracuse, New York 13220-2489
or email to IEEPRebates@meua.org
(Please do not send this rebate request to your electric utility.)

If you have any questions regarding the program, please contact the IEEP at (833) 239-0164 or IEEPRebates@meua.org.

▶ CUSTOMER INFORMATION:

Customer Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: (_____) _____ Work Phone: (_____) _____

Electric account number: _____ Is this household HEAP eligible? ☐ Yes ☐ No

Contractor Name: _____ Phone: (_____) _____

Contractor City: _____ State: _____ Zip Code: _____

Contractor contact name: _____

Continued on back...



Independent Energy Efficiency Program
P.O. Box 2489, Syracuse NY 13220-2489

This form © 2025 Independent Energy Efficiency Program. Effective Date: July, 2025



INSULATION PROGRAM

IEEP APPROVAL NUMBER (provided before work begins)	INCENTIVE AMOUNT	CONTRACTOR	CONTRACTOR PRICE	TOTAL IEEP INCENTIVE
	75% of the cost, up to a maximum of \$5,000			

▶ GENERAL TERMS AND CONDITIONS:

1. Incentives are available for municipal electric residential customers installing insulation and air sealing in existing buildings. Measures installed in newly constructed buildings are not eligible for rebates. 1-4 family units are eligible.
2. It is the responsibility of the customer to ensure that all requirements for the rebate are met and that all required documentation is provided. Failure to provide any of the required information will prevent processing of the application.
3. The IEEP may choose to inspect locations to verify project completion, to verify energy savings, or to survey on customer satisfaction. Such inspections will be made at a time convenient to the applicant, with advanced notice to the applicant. Misrepresentation of installation location or measure eligibility may result in forfeiture of the incentive award.
4. The IEEP reserves the right in its sole discretion to terminate or modify this program at any time.
5. One rebate check will be issued to the customer for each approved and completed application. Limit one rebate per customer per year.
6. Installations must be completed in accordance with all laws, codes and other requirements applicable under federal, state and local authority. Insulation contractors must be BPI Gold Star Certified in order to participate. Find contractors at BPI.org. Customer based self-installation projects are not allowed.
7. Customers are responsible for any such tax implications associated with reimbursement. Your electric utility and the IEEP are not responsible for any tax consequences associated with any payments.
8. The customer verifies that they have not received any other incentives from any other state programs for the same measures for which a rebate is being requested in this form.
9. Your electric utility and the IEEP assume no responsibility for performance of materials and material warranty.
10. The materials must be purchased new and installed within your electric utility's service territory within 6 months of IEEP approval date. Rebate applications must also be submitted within 6 months of installation date.
11. The customer relieves the electric utility and IEEP of any and all liability associated with this project.

I, the undersigned, agree to the terms and conditions of this document.

▶ CUSTOMER SIGNATURE: _____ Date (Month/Day/Year): _____



Independent Energy Efficiency Program
P.O. Box 2489, Syracuse NY 13220-2489

This form © 2025 Independent Energy Efficiency Program. Effective Date: July, 2025

Insulation Rebate Program Details



Incentive Details

- **Rebate Amount:** Up to 75% of project cost with a max. incentive of \$5,000
- **HEAP Eligible** – Up to 100% of project cost with a max. incentive of \$5,000
- **Eligibility:** Residential electric customers of participating electric municipals
- **IEEP Pre-Approval: Required before work begins**



Eligible Measures

- Attic, wall, rim joist, and crawl space insulation
- Air sealing, weatherstripping, duct insulation & attic ventilation



Customer Process

- **Select Contractor:** Choose from a list of BPI Gold Star Certified contractors
- **Scope of Work:** Customer/Contractor submits plan to the IEEP for pre-approval. If approved, the IEEP will issue a pre-approval number and work can begin.
- **Payment / Quality Assurance:** Payment is made and the IEEP will inspect a percentage of completed projects

Heat Pump Program



Your electric utility and the Independent Energy Efficiency Program (IEEP) are sponsoring this program to provide rebates for customers who install qualifying high-efficiency heat pump equipment. To receive your rebate without delay, fill out both sides of this form completely and mail it to the address below, along with:

- ▶ A copy of your dated sales receipt (application must be submitted within 6 months of appliance purchase)
- ▶ A copy of your most recent electric bill
- ▶ Have your installation contractor provide and include an AHRI certificate and documentation that the air source heat pump is on the Northeast Energy Efficiency Partnership (NEEP) ccASHP Product List. For ground source heat pumps and water heater heat pumps, please provide ENERGY STAR® Certification.
- ▶ Any rebate amount greater than \$1,250 requires pre-approval from the IEEP. Preapprovals should include a completed rebate application along with AHRI certificate and documentation that unit being proposed is on the NEEP ccASHP list.

Mail to: IEEP, P.O. Box 2489, Syracuse, New York 13220-2489, or email to IEEPRebates@gmail.com (please do not send this form with your utility bill payment). If you have questions or you require pre-approval, please contact the IEEP at (833) 239-0164 or IEEPRebates@gmail.com.

▶ CUSTOMER INFORMATION:

Name: _____ Date of Installation: _____
Contact Name: _____ Email Address: _____
Installed Address (include City, State, Zip): _____
Mailing Address (if different): _____
Contact Phone: (_____) _____ Other: (_____) _____
Electric Utility: _____ Electric Account Number: _____
Installing Contractor Name: _____ Contractor Phone: (_____) _____

▶ GENERAL TERMS AND CONDITIONS:

1. Incentives are available for residential and commercial electric customers replacing equipment in existing buildings. Measures installed in newly constructed buildings are not eligible for rebates.
2. It is the responsibility of the customer to ensure that all requirements for the rebate are met and that all required documentation is provided.
3. Failure to provide any of the required information will prevent processing of the application.
4. The IEEP may choose to inspect locations to verify project completion, to verify energy savings, or to survey on customer satisfaction. Such inspections will be made at a time convenient to the applicant, with advanced notice to the applicant. Misrepresentation of installation location or measure eligibility may result in forfeiture of the incentive award.
5. The IEEP reserves the right in its sole discretion to terminate or modify this program at any time.
6. One rebate check will be issued to the customer for each approved and completed application. Limit one rebate per customer per year.
7. Installations must be completed in accordance with all laws, codes and other requirements applicable under federal, state and local authority.
8. Customers are responsible for any such tax implications associated with reimbursement. Your electric utility and the IEEP are not responsible for any tax consequences associated with any payments.
9. The customer verifies that they have not received any other incentives from any other state programs for the same equipment for which a rebate is being requested in this form.
10. Your electric utility and the IEEP assume no responsibility for performance of equipment and equipment warranty.
11. The equipment must be purchased new and installed within your electric utility's service territory within six months of receipt purchase date. Rebate applications must also be submitted within 6 months of purchase date.
12. The customer relieves the electric utility and IEEP of any and all liability associated with this project.
13. Heat pumps must be installed by a certified contractor. Self-installs allowed for heat pump water heaters only.

I, the undersigned, agree to the terms and conditions of this document. I understand that I am fully liable for any tax consequence that may arise from this reimbursement.

▶ CUSTOMER SIGNATURE:

Date (Month/Day/Year): _____



▶ CUSTOMER INFORMATION cont'd:

Describe your building: ☐ Single family detached ☐ Multi-family ☐ Commercial ☐ Approximate square footage: _____

When was your building built? ☐ Prior to 1979 ☐ 1979-2006 ☐ 2007-Present

Describe cooling system replaced:

☐ Split system AC ☐ Single package AC ☐ Single package or split system HP ☐ Room AC ☐ None

What is your building's existing primary heating system type?

Warm air furnace: ☐ Gas/Propane ☐ Oil ☐ Electric ☐ Wood/Coal ☐ BTUs: _____

Boiler, hot water: ☐ Gas/Propane ☐ Oil ☐ Electric ☐ Wood/Coal ☐ BTUs: _____

Boiler, steam: ☐ Gas/Propane ☐ Oil ☐ Electric ☐ Wood/Coal ☐ BTUs: _____

Wood/Pellet Stove: ☐ Whole building ☐ Partial building

Electric Baseboard: ☐

If a residential building, are you eligible for HEAP? ☐ Yes ☐ No ☐ N/A

Qualifying Measures Worksheet

INCOMPLETE INFORMATION WILL DELAY OR DISQUALIFY YOUR REBATE.

EQUIPMENT & REBATE LEVELS	HEATING BTU	MANUFACTURER	CONDENSER MODEL # (OUTSIDE UNIT)	INSIDE UNIT COIL MODEL #	HEAT PUMPS: AHRI WATER HEATERS: UEF #	TOTAL INCENTIVE
Cold Climate Central Heat Pumps Must be on the NEEP ccASHP Product & Specification List						\$1,200/system
Cold Climate Mini-Split Heat Pumps Must be on the NEEP ccASHP Product & Specification List ☐ Partial Heating Load* ☐ Full Heating Load*						Partial: \$800/system Full: \$1,200/system
Ground Source Heat Pumps (GSHP) Must be ENERGY STAR® certified						\$2,000/unit
GSHP Desuperheater						\$100/unit
GSHP Water Heater Must be ENERGY STAR® certified UEF ≥ 23						\$750/unit
Air Source Heat Pump Water Heater Must be ENERGY STAR® certified UEF ≥ 23						\$750/unit
Smart Thermostat Must be ENERGY STAR® certified Provide model number						\$50/unit
▶ GRAND TOTAL:						



IEEP Heat Pump Rebate Details

Qualifying Measures Worksheet						
INCOMPLETE INFORMATION WILL DELAY OR DISQUALIFY YOUR REBATE.						
EQUIPMENT & REBATE LEVELS	HEATING BTU	MANUFACTURER	CONDENSER MODEL # (OUTSIDE UNIT)	INSIDE UNIT COIL MODEL #	HEAT PUMPS: AHRI # WATER HEATERS: UEF #	TOTAL INCENTIVE
Cold Climate Central Heat Pumps Must be on the NEEP ccASHP Product & Specification List						\$1,200/system
Cold Climate Mini-Split Heat Pumps Must be on the NEEP ccASHP Product & Specification List ☐ Partial Heating Load* ☐ Full Heating Load*						Partial: \$800/system Full: \$1,200/system
Ground Source Heat Pumps (GSHP) Must be ENERGY STAR® certified						\$2,000/unit
GSHP Desuperheater						\$100/unit
GSHP Water Heater Must be ENERGY STAR® certified UEF ≥ 2.3						\$750/unit
Air Source Heat Pump Water Heater Must be ENERGY STAR® certified UEF ≥ 2.3						\$750/unit
Smart Thermostat Must be ENERGY STAR® certified Provide model number						\$50/unit
▶ GRAND TOTAL:						

*Partial heating load <90% of the building's design heating load. Full heating load = 90%-120% of the building's design heating load.

Additional incentives for LMI customers may be available and will be evaluated on a case-by-case basis

How to Participate

- Complete an IEEP Insulation and/or Heat Pump Rebate form for pre-approval on the customer's behalf.
- Submit the rebate form(s), a detailed scope of work listing all work and costs separately to the IEEP. Include the customer's electric bill and LMI qualification documentation.
- Include any additional work-scopes for coordinated projects.
- If approved, the IEEP will return an authorization number (typically 1-5 days) and then the work can commence.
- Upon request, the IEEP may be able to pay the vendor directly.

How to Participate

**For both pre-approval and completed rebate forms,
mail or email documents to:**

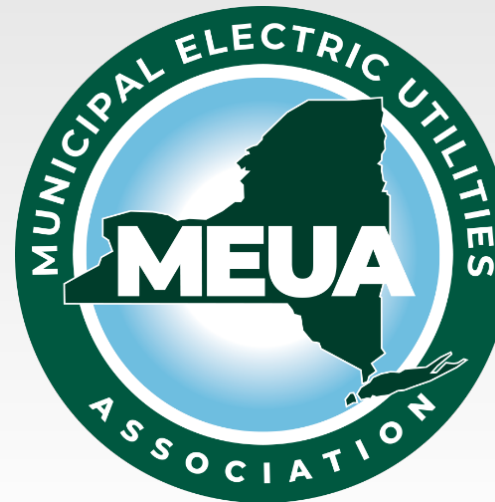
**IEEP Rebate Program,
P.O. Box 2489
Syracuse, New York 13220-2489
Email: IEEPRebates@meua.org
Phone: (833) 239-0164**

(Please *do not* send rebate form to the electric utility)

Questions and Discussion?

Thank you!

Mike Lyons
IEEP Program Manager
(315) 723-5514
mlyons@meua.org



SERVING NON-SBC CUSTOMERS PANEL

Samantha Pearce, Department of Homes and Community Renewal

Alex Valentino, PSEG Long Island

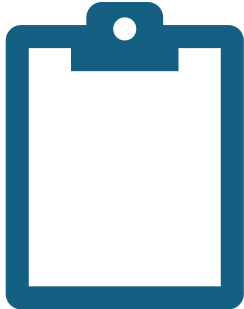
Michael Lyons, Municipal Electric Utilities Association of New York State

- Available offerings
- Distinctions between SBC and non-SBC programs
- Gaps and opportunities to coordinate
- Where to connect for more info



WRAP UP & NEXT STEPS

FEEDBACK FOR CONTINUOUS IMPROVEMENT



You can help improve these forums by taking a short, 2-minute survey:

<https://tinyurl.com/bdeb4627>



Upcoming Forums			
Quarter	Date	Time	Location
Q3 2026 Forum	October 28, 2026	10:00am - 3:00pm	NYC
Q4 2026 Forum	January 27, 2027	10:00 am - 12:30pm	Virtual

LMI EE/BE RESOURCE LIBRARY

- Upcoming Events
- Past Recordings
- Document Library
- Resources

LMI EE/BE DOCUMENT LIBRARY

Find Low- to Moderate-Income (LMI) Energy Efficiency and Building Electrification (EE/BE) Portfolio key documents including related Commission order, implementation plans, reports and guidance documents.

**Order Authorizing LMI EE/BE
Portfolio**

**LMI EE/BE Portfolio
Implementation Plan**

**Workforce Development
Implementation Plan**

Customer Referral Plan

**LMI EE/BE Performance
Management Framework**

**Clean Energy Guidance
Documents**

<https://dps.ny.gov/lmi-eebe>

dps.ny.gov/clean-energy-initiatives

On this page

Overview

Clean Energy Standard

Value of Distributed
Energy Resources

Energy Storage
Deployment Program

Electric Vehicles

Energy Efficiency and
Building Electrification

Energy Efficiency and Building Electrification

Energy Efficiency and Building Electrification (EE/BE) initiatives aim to increase access to energy efficiency and clean energy solutions across New York’s buildings sector, including low-to-moderate income (LMI) households and affordable multifamily buildings.

Utility-Administered Non-Low- to Moderate-Income Energy Efficiency & Building Electrification (Non-LMI EE/BE) ▼

NYSERDA-Administered Non-Low- to Moderate-Income Energy Efficiency & Building Electrification (Non-LMI EE/BE)▼

Low-to Moderate-Income EE/BE Portfolio ^

With the May 15, 2025 Low-to Moderate-Income (LMI) EE/BE Order, the Commission authorized budgets totaling approximately \$1.57 billion to fund energy efficiency and building electrification programs for the LMI market segment, including LMI households and affordable housing owners, for 2026 through 2030. The LMI EE/BE programs are administered by NYSERDA and

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Department of Public Service

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Post Comments **Subscribe To Service List** Request For Party Status

- Matter Master: 25-00758/25-M-0249

Matter Number: 25-00758

Industry Affected: Miscellaneous

Matter Type: Petition

Title of Matter/Case: In the Matter of the 2026-2030 Low- to Medium-Voltage Distribution System Efficiency and Building Electrification Program

Case Number: 25-M-0249

Company/Organization: New York State Department of Public Service

PARTIES	SERVICE LIST	WEB MONITORING
Generally, parties commit to contribute to the development of a complete record in a proceeding by conducting discovery, submitting testimony, briefs, or other formal written comments, and/or participating in evidentiary hearings, procedural conferences and other formal events conducted in the case. (Non-parties participate in PSC proceedings by filing informal comments, such as letters, in contrast to the formal comments filed by parties in response to Commission notices.) For some PSC proceedings, including rate cases, a person need not be a party to petition for rehearing of the Commission's final decision; however, in some other proceedings, only those who were parties in the case may petition for rehearing. The right to challenge a PSC decision in New York State Court may also be limited to those who were parties to the PSC proceeding. Under Commission rules, 16 NYCRR 4.3, you must seek permission to intervene as a party from the Administrative Law Judge (ALJ), if one is assigned to the case, or from the Secretary if there is no ALJ assigned. The standard for allowing intervention is whether your participation is likely to contribute to the development of a complete record or is otherwise fair and in the public interest; whether other parties are unfairly prejudiced is also considered. If you are a registered user of the NYS Public Service Commission's Document and Matter Management (DMM) System, you may submit your request for party status by clicking on the button below. Registration saves time and allows you to see and manage all of your service and party list subscriptions. When you submit the request for party status here, you will be provisionally added to the party list, subject to the right of other parties to object and subject to the final determination of the ALJ or Secretary. You will be required to mail your request to anyone on the party list who cannot receive e-mail service. If you do not wish to register on the NYS Public Service Commission's DMM System, you can download the Request for Party Status form using the hyperlink below. Please follow the instructions on the form. Download Party Status Request form.	Interested persons who wish to monitor the proceedings of a particular case can do so without the formal commitment to become party in the proceeding. The persons who subscribe to the service list of a case will receive an e-mail with a direct link to the documents issued by the Commission, such as orders, notices, and rulings. Persons unable or unwilling to receive such electronic notification will receive hard copies of Commission-issued documents by regular mail. If you are a registered user of the NYS Public Service Commission's Document and Matter Management (DMM) System, you may submit your service list subscription by clicking on the button below. Registration saves time and allows you to see and manage all of your service and party list subscriptions. Currently, another significant advantage of on-line registration is that registered users who subscribe to a service list for a case have the option to receive an e-mail with a direct link to all documents filed by the parties to the case, such as testimony, briefs, correspondence and formal comments, as well as the Commission-issued orders, notices and rulings. Those who submit their service list request by other means, such as submission of the form provided here, can only receive links to Commission-issued documents. If you do not wish to register on the NYS Public Service Commission's DMM System, you can download the Request for Service List form using the hyperlink below. Please follow the instructions on the form. Download Service List Request form.	Interested persons who choose not to sign up to receive e-mail notifications, can view our web site at their convenience to check on the status of a case. All documents filed by parties, correspondence, hearing transcripts, and documents issued by the Commission in a given case are posted on the website for that case. In addition, all comments submitted by the general public are posted under the 'public comments' tab for the same case. No registration is required. For more information on Web Monitoring click here.
Request For Party Status	Subscribe To Service List	

Don't have an account? Click [here](#) to create an account and become a registered user.

Service List - [How to Subscribe](#) - Step by Step instructions on how to subscribe to the Service List of Matter and Cases

For more information, visit:
<https://documents.dps.ny.gov/public/common/search.html>

<https://dps.ny.gov/participating-or-monitoring-psc-proceedings>

Thank you for participating in today's forum!

Next meeting is scheduled for October 28th in
NYC (with in-person and virtual options)



**Department
of Public Service**

For more on-demand resources, meeting summaries, and recordings, visit:

dps.ny.gov/lmi-eebe

APPENDIX

Commonly Used Acronyms

- **AMEEP:** Affordable Multifamily Energy Efficiency Program
- **AMP-UP:** Affordable Multifamily Program Upstate
- **BPA:** Building Performance Association
- **BPCA:** Building Performance Contractors Association
- **CBO:** Community-Based Organization
- **CEF:** Clean Energy Fund
- **DAC:** Disadvantaged Communities
- **DMM:** Document and Matter Management
- **DPS:** Department of Public Service
- **EE/BE:** Energy Efficiency / Building Electrification
- **JMC:** Joint Management Committee
- **KEDLI:** KeySpan Gas East Company d/b/a National Grid New York
- **KEDNY:** Brooklyn Union Gas Company d/b/a National Grid New York
- **LIPA:** Long Island Power Authority
- **LMI:** Low- to Moderate-Income
- **NENY:** New Efficiency New York
- **NMPC:** Niagara Mohawk Power Corporation d/b/a National Grid New York
- **NYSERDA:** New York State Energy Research and Development Authority
- **PA:** Program Administrator
- **PSC:** Public Service Commission
- **RGGI:** Regional Greenhouse Gas Initiative
- **SMI/AMI:** State Median Income / Area Median Income

2026-2030 LMI Portfolio Budgets (\$millions)*

	NYSERDA	Con Edison	KEDNY	KEDLI	Total
1-4 Family	\$445.5	\$-	\$-	\$-	\$445.5
Multifamily	\$316.2	\$401.5	\$86.2	\$16.7	\$820.6
General Awareness & Ed.	\$52.3	\$-	\$-	\$-	\$52.3
Workforce Development	\$30 <i>(+\$53 in Non-LMI)</i>	\$-	\$-	\$-	\$30 <i>(+\$53 in Non-LMI)</i>
Administration	\$120	\$47.9	\$2.8	\$2.1	\$172.8
EM&V	\$24	\$7.9	\$2.7	\$0.5	\$35.1
NYS Cost Recovery Fee	\$12	\$-	\$-	\$-	\$12
Total	\$1,000	\$457.5	\$91.7	\$19.4	\$1,569

**The May 2025 Order provides a total budget for utilities, budget breakdowns are as proposed. Numbers may not sum due to rounding*

Open-NY Clean Energy Dashboard

[Dashboard:](https://www.nyserda.ny.gov/About/Tracking-Progress/Clean-Energy-Dashboard/View-the-Dashboard)

<https://www.nyserda.ny.gov/About/Tracking-Progress/Clean-Energy-Dashboard/View-the-Dashboard>

Filter by Program

Filter by PA

Filter by Portfolio

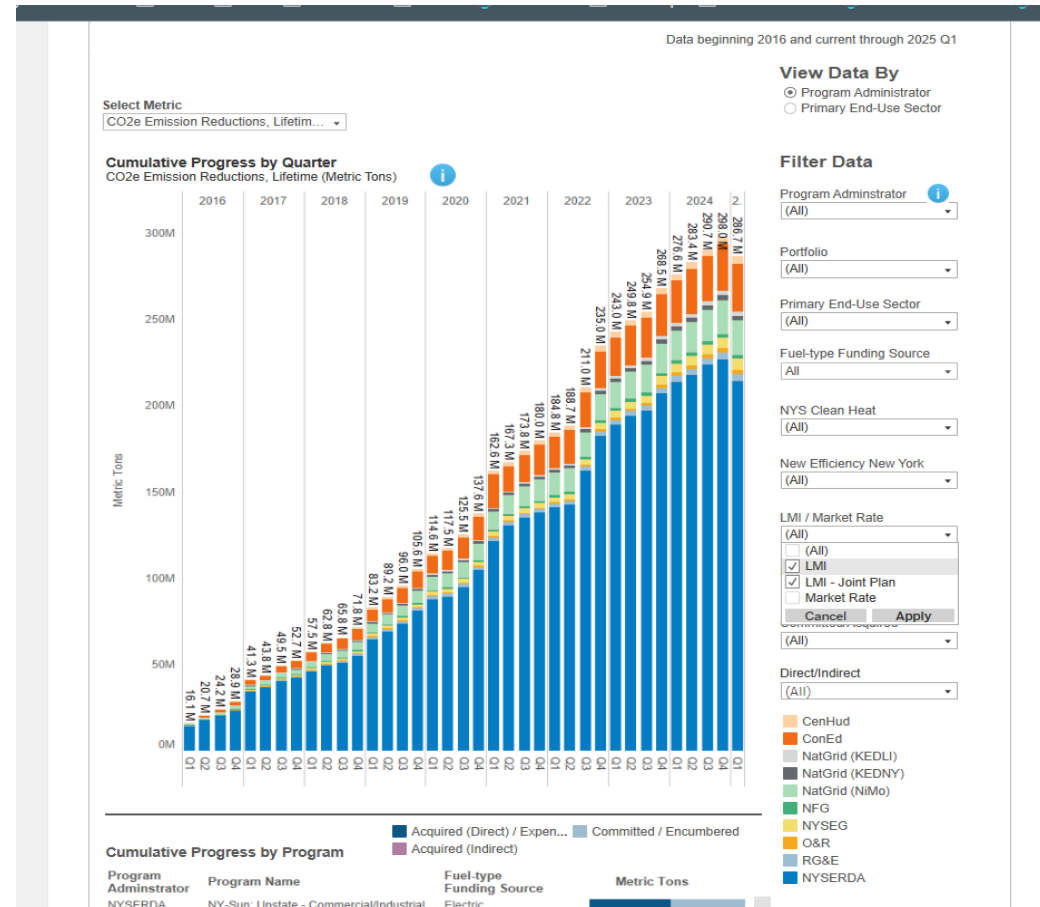
<https://www.nyserda.ny.gov/About/Tracking-Progress/Clean-Energy-Dashboard>

Data Dictionary

https://data.ny.gov/Energy-Environment/NYSERDA-Clean-Energy-Dashboard-Progress-and-Plans-/3rux-yyd9/about_data

Open-NY Datasets:

- Program Progress
- Participants
- Plans (Reflective of SEEPS/CIP)



LMI Portfolio Metrics

Annual Report

- Expenditures/Incentives by Program
- Direct Energy Savings, Measure info, by Program
- Metrics on LMI Statewide Portfolio/Program Stakeholder Engagements
- Frequency, Attendees of AMEEP Roundtable
- Metric Comparison - Actual to Implementation Plan Project, by year
- NY Energy Advisor Metrics
- PA achievement to budgets and targets, variance
- Portfolio Unit Costs
- Program Measure Mix by PA
- Realization Rate by PA
- Regional Energy Hubs Metrics
- Utility Community Based Customer Engagement Initiatives Metrics

Implementation Plan

- ~~BCA Ratio~~ Societal Cost Test (SCT); Utility Cost Test (UCT)
- Budget by Sector
- Budget Expended past years
- Budgets and Benefits by PA
- Budgets, Benefits, Metrics by Sector
- CO2e Emission Reduction (metric tons) annual and lifetime savings achievements
- Administrative Costs
- Direct and Indirect savings
- Implementation Milestones
- Leveraged Funds
- Measures
- MMBtu annual and lifetime savings achievements
- MWh annual and lifetime savings achievements
- Number of EmPower+ contractors
- Number of participants served
- Cross-cutting program details
- Participant bill savings, annual and lifetime (Deemed)
- Scorecard Program Mapping to IP
- Utility LMI Ordered vs Planned Budgets and Benefits



New Case Numbers

May 2025 Orders established new case numbers for 2026-2030 Portfolios:

25-M-0248

In the Matter of the 2026-2030
Non-Low- to Moderate-Income
Energy Efficiency and Building
Electrification Portfolios

25-M-0249

In the Matter of the 2026-2030
Low- to Moderate-Income
Energy Efficiency and Building
Electrification Portfolio

Items related to the current portfolios will continue to be filed under cases 14-M-0094 (CEF) and 18-M-0084 (NE:NY)

Additional Case/Matter Numbers

Matter No.	Proceeding	Topic
14-M-0094	Proceeding on Motion of the Commission to Consider a Clean Energy Fund	NYSERDA CEF Portfolio (2016-2025)
18-M-0084	In the Matter of a Comprehensive Energy Efficiency Initiative	Utility NE:NY (2016-2025) EE/BE Portfolios
16-02180	In the Matter of Clean Energy EM&V	EE/BE EM&V
15-01319	In the Matter of the New York State Technical Resource Manual	Technical Resource Manual
13-M-0412	Petition of New York State Energy Research and Development Authority to Provide Initial Capitalization for the New York Green Bank	NYGB DAC Component
21-E-0629	In the Matter of the Advancement of Distributed Solar	Statewide Solar for All