

New York State Department of Public Service

LMI EE/BE Quarterly Forum

Stakeholder Comment Summary

July 29, 2026

Reminders:

The webinar recording, slide deck, and compiled Q&A will be posted after the event in the Department of Public Service (DPS) Document and Matter Management system (DMM) in Case 25-M-0249.

<https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?MatterCaseNo=25-M-0249&CaseSearch=Search>

To subscribe to email notifications of filings in the Document and Matter Management System (DMM), please find the Case/Matter number you are interested in at

<https://documents.dps.ny.gov/public/common/search.html> then click the “Subscribe to Service List” at the top right of the page. For further assistance with DMM you may call the Public Affairs Office at (518) 474-7080. For questions regarding Party Lists, please call (518) 474-4521.

Stakeholders can also subscribe to direct email announcements about the LMI EE/BE Forums including input opportunities into agenda and meeting topics by visiting dps.ny.gov/lmi-eebe and [joining our email list](#).

Portfolio and Policy Updates

Question: Are residents going to be able to stack the Excelsior Power program with programs like National Grid's Connected Solutions program for smart thermostats?

Response: Interested stakeholders should follow matter 26-M-0525 in DMM for all filings in the Proceeding on Motion of the Commission to Initiate the Excelsior Power Program. DPS staff can provide an update on this at a future forum as more information becomes available.

Question: Will Excelsior include demand response programs?

Response: The Excelsior Power program is intended to address demand response.

Question: Is the RATES Commission related to Con Edison's Reliability Contingency Plans?

Response: It is not directly related, but it is relevant. The Rates Commission's scope is to further study the root causes of rising utility rates, and reliability and capacity on the electric system are contributing factors to electric rates. Con Edison filed its updated New York City Reliability Contingency Plan in Case 25-E-0764 to address projected transmission security

gaps in New York City.

Question: Who is on the RATES Commission?

Response: Members of the RATES Commission have not yet been announced.

Question: Are you comparing program incentives levels, costs, administrative metrics?

Response: Yes, the reporting for the EE/BE portfolio and programs includes budgets and expenditures for incentives, implementation, and administrative costs. These metrics are also incorporated into the “money-out-the-door” metric that is used to track the percentage of overall program funds going into projects.

Program Performance

Question: Has there been any studies done to see what is the best way to contact low-income families?

Response: Email, mailers, and phone banks, along with local offices that have in-person staff, have been suggested as effective methods. NYSERDA will continue to review Regional Assessment and Barriers Analysis (RABA) reports for opportunities to better connect with low-income and Disadvantaged Communities (DAC) families.

NYSERDA has found success with digital efforts tracking “apply now” to “learn more” calls-to-action to manage uptake and ensure equitable service. NYSERDA and utilities, as part of the Customer Referral Plan, will be conducting a process evaluation for EmPower+ referrals to understand past successes and failures, which will inform future referral strategies. We have years of learnings from NY Energy Advisor's outreach and in-market support and seen what has been effective. Additionally, we understand that there is a significant Mobile component in the income-eligible segment. Furthermore, NYSERDA has also taken steps to auto-translate messaging on mobile devices when marketing is implemented in Spanish, Russian and Mandarin to ensure are more 1:1 user experience.

Question: Has NYSERDA explored partnering with utilities to offer proactive, personalized outreach to consumers? Reaching the people who may not be the proactive folks or those reached by marketing.

Response: This is the purpose of the Customer Referral Plan that NYSERDA and the utilities are currently working on, and was filed September 3rd, 2026, which targets outreach to low-income utility customers with high usage.

Question: Has there been any studies done to compare when contractors were supported with more marketing funds compared to when those funds were greatly reduced?

Response: A specific study has not been conducted on this. However, when both NYSERDA and contractors have been actively marketing a program, an uptick in engagement with programs and website pages has been observed, suggesting increased participation when cooperative advertising is in place. While specific numbers are not immediately available, there is generally a lift in program participation for EmPower+ when marketing is active. It is important to note that NYSERDA must be careful with how much marketing is pushed into the market to avoid over-subscribing programs or creating a waiting area for applicants if processing times increase.

DPS expects that the work underway between the utilities and NYSERDA to improve utility outreach and marketing of EmPower+ to eligible customers will increase participation of customers that are identified as having higher energy consumption.

Question: Have the EmPower+ funds in last year's Sustainable Futures Program been spent?

Response: The \$50 million appropriation from last year for EmPower+ is not yet fully spent. It took several months to clarify what was allowed under that funding stream, deployment of these funds began in early 2026 initially focused on heat pump water heaters with plans to expand to other measures. An additional \$200 million for EmPower+ in fiscal year '27 will provide flexibility to maintain incentive levels and services while the program adapts to more restrictive federal rules announced in May 2026.

Question: Is there a report of EmPower+ projects that have been completed to date (and in pipeline) - with detailed information on geography, costs, scopes, etc.?

Response: EmPower+ is currently working on a report that will quantify the historical distribution of projects by geography, which is expected to be released later this year. Historical EmPower+ data is also available on Open Data NY (<https://data.ny.gov/>).

Question: I'm wondering with the additional budget money and RGGI money going into EmPower+, if the spend rate would go back up to meet the demand that clearly exists. How are you keeping it at \$14 million per month? Are contractors not allowed to do applications anymore or what are the sorts of barriers that are being put up to keep that spend rate the way you want it?

Response: EmPower+ spending is down from last year. To manage program production with available budgets, NYSERDA is aiming to maintain monthly program spending in proportion to annual program budgets. For EE/BE, NYSERDA outlines the annual program budget in the [LMI Implementation Plan](#). Current spending trends are between \$12-13 million per month in

2026. The goal is to provide sufficient steady-state funding and certainty for contractors for the next four to five years, combining RGGI, EE/BE, and the new \$200 million State appropriations.

Question: Is there good demand for the small building pathway (in AMP Up)?

Response: As of July 29, 2026, 7 of the 16 applications submitted to AMP Up are following the small building pathway.

Question: Could you provide a contact phone number for the AMP Up program, as there doesn't seem to be one on the website?

Response: There is no specific phone number for the AMP Up program. Inquiries can be sent to multifamilyprograms@nyserda.ny.gov to request a call.

Question: What are the programmatic obstacles that are currently being worked through to enhance program performance and meet commission objectives for multifamily teams?

Response: NYSERDA's multifamily team (AMP Up) is working to address barriers identified by building owners and market partners, refining program design based on customer and stakeholder feedback. Program design updates for the current year may include:

- Aligning incentives with strategic objectives, prioritizing cost-effective measures with durable lifetimes.
- Reviewing administrative processes and simplifying them to reduce customer burden and project timelines.
- The AMP Up program is serving 2-4 unit buildings when they are part of a larger project with 5 or more units when ownership structure (e.g., public housing), LIHTC assessment requirements, or other situations exist where AMP Up processes and service providers would be a better fit.
- Market outreach strategies that include working closely with Regional Clean Energy Hubs and Community Based Organizations (CBOs), such as the Rural Housing Coalition, to identify properties and owners in rural/hard-to-reach areas.
- Conducting an AMP Up roadshow across upstate regions to engage potential owners and contractors, particularly smaller contractors not already in the Multifamily Contractor Network.
- Integrating with IPNA audits to ensure IPNA audits can be applied and used for AMP Up participation, addressing smooth transitions for projects that have or plan to undergo IPNA audits.
- Addressing historic preservation properties by acknowledging timing issues with milestone dates in AMP Up for these properties and working to overcome this.

Technical assistance has been integrated directly into the AMP Up program process to streamline it and reduce confusion. Collaboration with Con Edison and National Grid on a common intake platform and using the My Energy Learning Center to host all program information is also underway, acting as a one-stop shop for customers.

Con Edison is also working to address programmatic obstacles and has made the following updates to program design:

- Updated the comprehensive pathway in Affordable Multifamily Energy Efficiency Program (AMEEP) by lowering the participation threshold from 100 points to 80 points, increasing accessibility for deeper energy retrofits.
- Offered a mid-project incentive payment to address financing challenges.
- Released a technical guide in March alongside the new program manual to clarify technical inspection requirements.

Question: Is there a way for the North Country to receive more workforce development support, as they are not getting much from Clarkson or other funded training providers, beyond subsidized payroll, for training people in an underserved market?

Response: Stakeholders can join program office hours to speak with staff about technical skills training, upskilling, and On-the-Job Training (OJT) programs. The program may be able to make connections between local partners in the area, such as BOCES, and explore options for coordination, acknowledging that the Clarkson project is new and not all resources are immediately available. Info about the program can be found here, along with a link to sign up for office hours: <https://www.nyserda.ny.gov/All-Programs/Technical-Skills-Training-and-Upskilling>

Question: What are the current program design considerations and challenges being tackled in workforce development, and where are ongoing conversations taking place?

Response: NYSERDA was tasked by the Energy Efficiency and Building Electrification (EE/BE) orders to conduct a workforce development assessment of the EE/BE ecosystem in New York State, which is well underway and scheduled for publication in September. This assessment incorporates stakeholder insight, industry surveys, and regional considerations to understand workforce needs, barriers, and opportunities. Gaps in contractors are being addressed by supporting projects that provide training and certifications required by different programs, making training dollars available through a network of training organizations. The On-the-Job Training (OJT) program works directly with contractors to help them grow their staff. Structural challenges in areas with low contractor participation due to business location and capacity were noted. Clean Energy Hubs are actively working to grow the number of contractors by

hosting events and offering assisting with paperwork to make participation easier for contractors. NYSERDA is also engaging Weatherization Assistance Program (WAP) subgrantees to increase their participation in EmPower+.

LMI Electrification

Question: What steps has NYSERDA done to certify homes meet the ASHP guidelines to be heat pump ready to streamline for Empower+ past and current projects?

Response: NYSERDA is working on leveraging the My Energy Portal to tag properties as "heat pump ready" or having a "heat pump ready envelope," with a goal to deploy this in 2028. This involves aligning NYSERDA's prescriptive heat pump ready specification with the criteria used by utilities for the Clean Heat program. Three paths are being developed by Clean Heat to identify heat pump ready homes: a categorical path based on home vintage, a prescriptive path with specific R-value or air changes per hour standards, and a heat load per square foot metric designed by the Clean Heat Joint Management Committee (JMC). The goal is to provide a reliable tag in the My Energy Portal, allowing customers to know if their home meets the specification and be able to share this information with contractors.

Question: Does NYSERDA have any lists of customer homes that meet the heat pump guidelines that contractor can receive to target these homes to help meet New York Heat Pump Guidelines?

Response: NYSERDA does not foresee being able to share lists of customers with contractors due to privacy issues. Instead, the goal is to make the "heat pump ready" information transparent and available to the customer through the My Energy Portal, so they can elect to share it with someone else if they wish.

Question: If a home has a singular ASHP for one room and an oil boiler for the rest of the home, will the program still fund an ASHP project there?

Response: EmPower+ currently requires heat pumps to serve the whole home heating load and that the existing fossil fuel system be decommissioned when installing heat pumps. However, having one existing ASHP does not preclude eligibility for any future ASHP project.

Question: Is the EmPower+ program accepting heat pump projects for current natural gas-fueled heating systems?

Response: Yes. There has been hesitancy to convert low-income natural gas customers in small homes to heat pumps due to potential bill implications. The Energy Affordability Guarantee Pilot aims to mitigate this concern by providing a safeguard to customers against energy bill increases when electrifying small homes that use natural gas. Contractors can mark

a project as eligible for the Guarantee and proceed with natural gas to heat pump conversions by using a project reservation form found on the contractor support site.

Question: Is there any effort by NYSERDA's one-to-four family home team to apply federal Home Energy Rebate (HER) funds, which currently allow partial load or hybrid systems?

Response: NYSERDA is strategically shifting federal HER/HOMES and HEAR/HEEHR funds to focus HER/HOMES grants on multifamily applications and HEAR/HEEHR funds on one-to-four family homes. This is to ease operational challenges with the HER/HOMES program in the single-family space. To make full use of the Sustainable Futures Program (SFP) funding awarded to EmPower+ and manage new Federal guidelines for the HEAR program, NYSERDA has shifted all heat pump incentives to SFP. HEAR funds will be used only for weatherization projects. Therefore, a path for partial load or hybrid systems for one-to-four family homes under the Home Energy Rebate funds is not foreseen. DPS welcomed additional thoughts and detail on the topic of partial heat pump installations and offered to set up a separate conversation to discuss it.

Question: Are you accepting heat pump projects for electric resistance heated homes, considering they offer clear savings and are not fuel switching, and potentially easier for renters? Additionally, is consideration given to hybrid heat pump systems for LMI customers with efficient gas furnaces for affordability and comfort?

Response: Targeting electric resistance households is an interesting strategy that DPS is interested in exploring further. Electric resistance as a primary heat source is less common in New York State, which can be as low as 2% of single-family homes depending on the region. Virtual energy assessments could help identify these homes, and they would be prioritized similarly to delivered fuel customers in terms of potential cost savings. NYSERDA affirms a desire to serve these customers. NYS HCR's AMP and Green Small Buildings programs prioritize customers on electric resistance (as well as delivered fuels) as part of their electrification screening tools, and they observe a significant proportion of multifamily properties with electric resistance heating as early adopters.

Regarding hybrid systems, programs currently operate under guidelines from the 2025 EE/BE orders which "paused" on hybrid systems due to finite budgets and a focus on maximizing impact through full electrification. DPS staff has filed a report on hybrid heat pumps and welcomes comments or thoughts on this report or other considerations related to hybrid systems to inform future commission decisions. NYS HCR programs distinguish between two types of hybrid systems: supplemental hybrid (two systems operating concurrently in the same space, typically not funded if it involves blended fuel sources) and space-conditioned hybrid (a heat pump added to a portion of a home previously unserved or

underserved by the existing fossil fuel system, thereby making that space conditioned). The space-conditioned hybrid approach is allowed in the HCR AMP program.

Question: Why isn't HEAP required to cover the cost to service and repair heat pumps?

Response: HEAP representatives were not in this meeting to answer.

Question: What are the potential approaches for addressing electrification in "no heat" emergency situations?

Response: No-heat situations and LMI electrification are both complex topics, making integration of the two particularly challenging when resolving the no-heat emergency means turning around an installation within hours or days. This is an issue that needs to be worked through as an ongoing topic for future discussion.

Question: What types of buildings are you funding in the Clean Heat for All pilot?

Response: The pilot initially focused on window heat pumps with the New York City Housing Authority. The program has since been expanded to building typologies different from NYCHA buildings and to install both window and through-wall heat pumps in climate zones five and six to gather better performance data in extreme temperatures. This aims to build confidence in these solutions as full-load solutions statewide. The demonstration currently does not require heating system decommissioning. Significant interest from co-ops and condos in New York City has been noted and there is keen interest in engaging owners/operators in the upstate market. A variety of residential, multifamily, and smaller homes are being sought to have a more robust dataset across a broader building typology.

Question: What is the policy and regulatory context around cost shifting from landlords to tenants for heating in multifamily buildings?

Response: The baseline condition is that heating costs are typically paid by the landlord. The concern with "plug-and-play" heat pump technology is that it can shift this cost to the tenant's meter. This poses a real challenge for affordability, especially in naturally occurring affordable housing, as there is currently no protection preventing landlords from shifting these costs to tenants' utility bills in unregulated contexts. In the LMI EE/BE Order, the Commission incorporated program rules to not allow electrification projects where cost-shift cannot be mitigated.

Question: The presentation mentioned the use of master meters versus sub-metering, but that transition is expensive. Do you have examples?

Response: A demonstration project undertaken by Con Edison aims to assess opportunities for preventing cost shifts in multifamily buildings. This project investigates different models for

keeping the heating load for heat pumps on the master meter (or central meter) for the building, rather than individual tenant meters, to mitigate potential increases in tenant electricity costs. The demonstration is exploring both centralized and decentralized building configurations and is expected to provide insights on operating costs. The concern with "plug-and-play" heat pump technology is that it can shift heating costs from the landlord to the tenant's meter, posing an affordability challenge, especially in unregulated affordable housing where there is no current protection preventing this shift.

Question: What is the approach to aligning policies and regulations related to housing and submetering in the multifamily space?

Response: A holistic approach to supporting LMI electrification is needed. This includes aligning policies and regulations related to housing and submetering. Historically, submetering has been viewed as a way to encourage customers to manage electricity consumption. However, electrification projects can potentially add a heating load to a customer's meter that might not have had it before, creating cost shift and affordability considerations. These are interrelated policy and programmatic design considerations that need to be addressed and are under consideration by DPS.

Serving Non-SBC Customers

Question: Is there a report on last year's GAP funding?

Response: The first appropriation of \$2 million for the Green Affordable Pre-Electrification (GAP) program in FY 25-26 was fully contracted out to 12 community action and nonprofit groups statewide. These funds are fully appropriated and accounted for, with most groups having begun deploying them. More intel on the number of units served is expected in a couple of months.

Question: For the GAP program - do you know if this will open up to new applicants, or if new funds will only be open to existing subrecipients?

Response: A new Notice of Funding Availability (NOA) will be issued, available to agencies and groups currently working with HCR on various programs. This means there could be opportunities for new groups that meet the eligibility requirements listed in the NOA, even if they were not among the original 12 recipients. A minimum requirement for applicants will be to be nonprofit community action agencies.

Question: Can you explain the allocation for Mitchell-Lamas in greater depth?

Response: At least \$50 million of the \$150 million in Sustainable Future dollars that HCR is receiving for FY26 is appropriated to support a combination of New York City Housing Authority (NYCHA) and Mitchell-Lama properties downstate and across the state to reduce carbon emissions through heat pump installations. There is currently no clear split on how this will be divided between Mitchell-Lamas and NYCHA. HCR's program team will work with NYCHA to assess pipeline and potential, with decisions based on project timeliness and readiness.

Question: Which HCR programs provide eligibility to naturally occurring affordable housing that are not regulated?

Response: The Weatherization Assistance Program (WAP), Green Affordable Electrification Program (GAP), Green Small Buildings Program, and All-Electric Multifamily Program (AMP) are eligible for naturally occurring affordable housing that is not necessarily refinanced or subject to HCR regulatory agreements. The only program that requires a regulatory agreement with HCR is the Clean Energy Initiative program.

Question: For customers like NYCHA who don't pay SBC funds, are there other opportunities to pair, stack, or braid incentives beyond utility incentives (e.g., for gas programs) to continue electrification efforts?

Response: For the upstate multifamily market, NYSERDA does have funds set aside for non-System Benefits Charge paying low-to moderate-income (LMI) housing customers in AMP Up that could be used for implementation. Additionally, LMI multifamily technical assistance programs, which include FlexTech, On-site Energy Manager, and SAMES (Small Affordable Multifamily Energy Studies), have also set aside funding for these customers.

Question: Can you clarify the current enrollment and data collection status for the Energy Affordability Guarantee pilot?

Response: Households who electrified through EmPower+ are actively being enrolled in the pilot. Currently, around 30 customers are actively enrolled, with a pipeline of about 100 in the application phase. DPS and NYSERDA teams are working to ensure that contractors inform EmPower+ customers about the guarantee when discussing electrification projects. There is still room to add more participants to the Guarantee Pilot. The Guarantee can only apply to EmPower+ Tier 1 projects completed after May 1, 2023, which is a key timing consideration for eligibility.

Question: Which IEEP municipal utilities are offering the insulation rebate?

Response: All 38 IEEP systems participate in the insulation program. A list of these systems will be available in the presentation provided after the session. IEEP can be contacted at IEEPRebates@meua.org or by phone at (833) 239-0164 for more information.

Question: Where are the opportunities for collaboration among program administrators of non-System Benefits Charge (SBC) programs (HCR, PSEG Long Island, IEEP) and how do these programs distinguish from SBC-funded programs, especially considering regional uniqueness?

Response: Most HCR programs are state or federally appropriated funds, making them "agnostic" to SBC or non-SBC territories, meaning they are available statewide without regional restrictions. HCR's AMP, GAP, and standalone CI programs are designed to be paired with utility programs (including SBC-funded ones) either before, during, or after, to ensure a holistic approach. The Weatherization Assistance Program can also be paired with many of these programs. PSEG Long Island's programs, funded by a "DER charge" (similar to SBC), are designed to be similar to other utility programs but with specific caveats. They focus on educating trade allies and outreach teams to provide customized reports to customers based on energy assessments, guiding them to appropriate programs (including National Grid or United Way programs). IEEP's municipal electric utility systems are often small and have individual budgets, necessitating careful marketing. IEEP has had success collaborating with Clean Energy Hubs through grassroots campaigns, especially in underserved regions like the Adirondacks, using word-of-mouth efforts.