



September 12, 2025

VIA ELECTRONIC FILING

Hon. Michelle L. Phillips
Secretary to the Commission
New York State Public Service Commission
Agency Building 3
Albany NY 12223-1350
E-mail: secretary@dps.ny.gov

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

Dear Secretary Phillips:

Department of Public Service Staff (Staff) held three webinar discussions on the continued development of the LMI Portfolio Performance Management Framework, in accordance with the Commission's May 15 2025 Order Authorizing Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio for 2026-2030. Webinars were held on Tuesday, August 19th, Friday, August 22nd, and Tuesday, August 26th. At the webinars, Staff facilitated discussion on considerations for Staff oversight of the performance of the LMI EE/BE programs, including potential metrics, the accessibility of information on program performance, options for incorporating stakeholder engagement on the performance of programs, and additional considerations. Below are the URLs linked to each webinar recording, which includes the transcripts of the audio and chat/Q&A logs.

Webinar Recordings:

Tuesday, August 19 – 2:30 pm to 4:30 pm – Topic: Outcomes & Metrics Webinar Recording: <https://meetny-gov.webex.com/meetny-gov/ldr.php?RCID=111051ac25fddb81d34799cb570233b>

Friday, August 22 – 9:00 am to 11:00 am – Topic: Reporting & Access to Information Webinar Recording: <https://meetny-gov.webex.com/meetny-gov/ldr.php?RCID=48591b3ea8d2a4a629dff83bcd0bcc4f>

Tuesday, August 26 – 1:00 pm to 3:00 pm – Topic: Ongoing Stakeholder Engagement Webinar Recording: <https://meetny-gov.webex.com/meetny-gov/ldr.php?RCID=75aeb332d5ceba8bda736ed1a8050016>

The material reviewed during these webinars is included herein. Stakeholders can direct additional questions or comments on the LMI Portfolio Performance Management Framework to Equity@dps.ny.gov.

Sincerely,

/s/ Christopher Coll

Christopher Coll
Project Director,
Office of Markets & Innovation



**Department
of Public Service**

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



**Department
of Public Service**

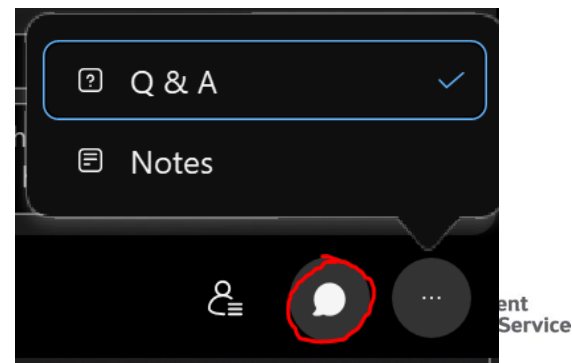
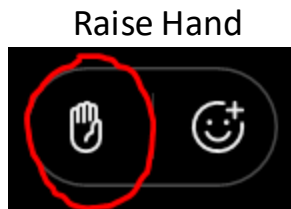
LMI EE/BE Performance Management Framework

Webinar Discussion

August 19, 2025

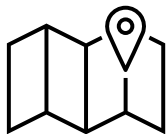
Housekeeping

- Run time: 2:30 pm – 4:30 pm
- Participants are muted upon entry but able to unmute themselves.
- Chat is enabled but will not be monitored for questions.
- Please use the Q&A feature or raise hand feature to ask a question. Staff will follow-up any unanswered questions in the Q&A following today's webinar.
- Materials from today's webinar, including slides and summary notes will be posted to DMM: 25-M-0249



Agenda

1. Update of Performance Management Framework
2. Recap on July 7 Performance Management Webinar
3. Discussion on LMI Portfolio Metrics and Outcomes
4. Next Steps



Quick Poll!

Goals for Today

1. Obtain feedback from participants on outcomes and metrics of the LMI portfolio and programs
2. Identify next steps

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



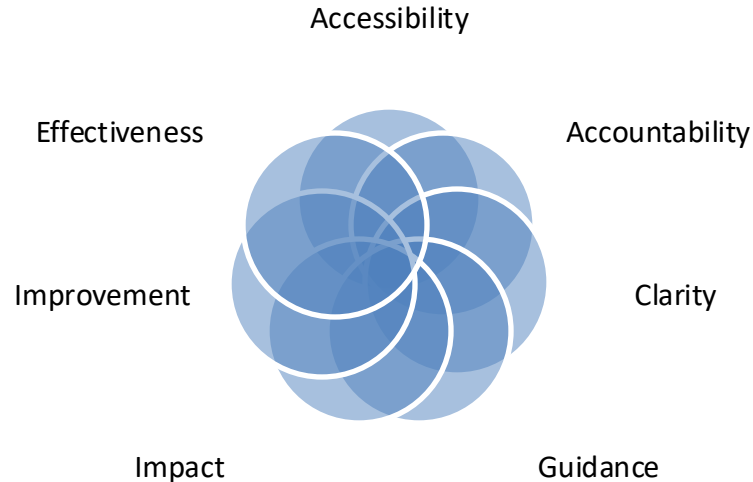
Performance Management

- LMI EE/BE Performance Management Principles
 - Process of continuous improvement of portfolio and individual programs
 - Measurement of progress towards objectives and goals
 - Visibility on Portfolio and program progress towards achieving goals/objectives
 - Input and discussion from program stakeholders, including voice of customer
- Considerations
 - Balancing burden of reporting and measurement; consistency with Non-LMI
 - Method and timing of measurement (program metrics vs. studies)
- Performance Management Framework
 - Blueprint for the performance management process for the LMI Portfolio
 - Staff filing due September 12
 - Specifics on data and reporting to be outlined in Staff Guidance Documents



Recap on Performance Management Discussions

- July 7- Webinar discussion to obtain initial input on three areas of performance management:
 - Outcomes and metrics
 - Accessibility of Information on Program Performance
 - Stakeholder Engagement
- What does performance management mean to you?



Additional Feedback from July 7th

What metrics or data points can be used to measure progress towards the outcomes that you have identified?

- Administrative (2)
 - Costs of portfolio investments
 - Leveraged funds
- Deferrals (4)
 - Project Approval Delay
 - Share of applications deferred
 - Share of deferrals completed
- Environmental/Energy savings (6)
 - Annual and lifetime CO2 Emissions
 - Participant Bill Savings
 - Reduced Energy Demand in Homes
- Outreach and Engagement (2)
 - Participation counts at public engagement events
 - Attendance at contractor engagement events
- Participant Details (4)
 - DAC Participation Rate
 - Participation by Household Income
- Project Details (13)
 - Average Incentive Per Project
 - Reduced Energy Use
 - Share of Customer Contribution
 - Income, Geography, Tenure, and DAC status.
- Others
 - Market penetration
 - Project Completed from Utility Referrals
 - Referral (contractor) wait times
 - Share of customer contribution and relationship to completed projects
 - Application completion times
 - Program changes

Discussion

Discussion: LMI EE/BE Outcomes and Metrics

- How should we measure progress towards the Commission's objectives for the EE/BE LMI Portfolio?
 - Reduce energy consumption and cost for households experiencing the greatest energy burden;
 - Maximize the impact of ratepayer funds through effective coordination, the leveraging of other funding sources, and administrative efficiencies;
 - Simplify participation and administrative burden for applicants and contractors;
 - Seek and incorporate feedback from market participants in the design and implementation of programs;
 - Enhance transparency in program and portfolio performance; and
 - Ensure clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets.
- Consider metrics and outcomes at the Portfolio/Market, Program, and Participant levels

Measuring Progress

Identification
of Metrics

Baselines

Defined
Outcomes

Measurement & Reporting

Availability
of Data

Public vs.
Non-Public
Disclosure

Customer
Consent

Evaluation of Performance

Data Systems

Portfolio/Market Level Impacts

Administrative

- Cost associated with all Portfolio investments
- Leveraged Funds
- Market penetration - Customer contribution and number of projects that get done related to that

Environmental/Energy Impacts

- % Reduction in Energy Savings
- CO2e Emission Reduction (metric tons) annual
- CO2e Emission Reduction (metric tons) Lifetime
- Deemed Participant Bill Savings

Participant Details

- DAC participation rate
- distribution of participating households by income band
- Distribution of projects by utility territory, socio-demographic indicators, and disadvantaged community (DAC) status.

Project Details

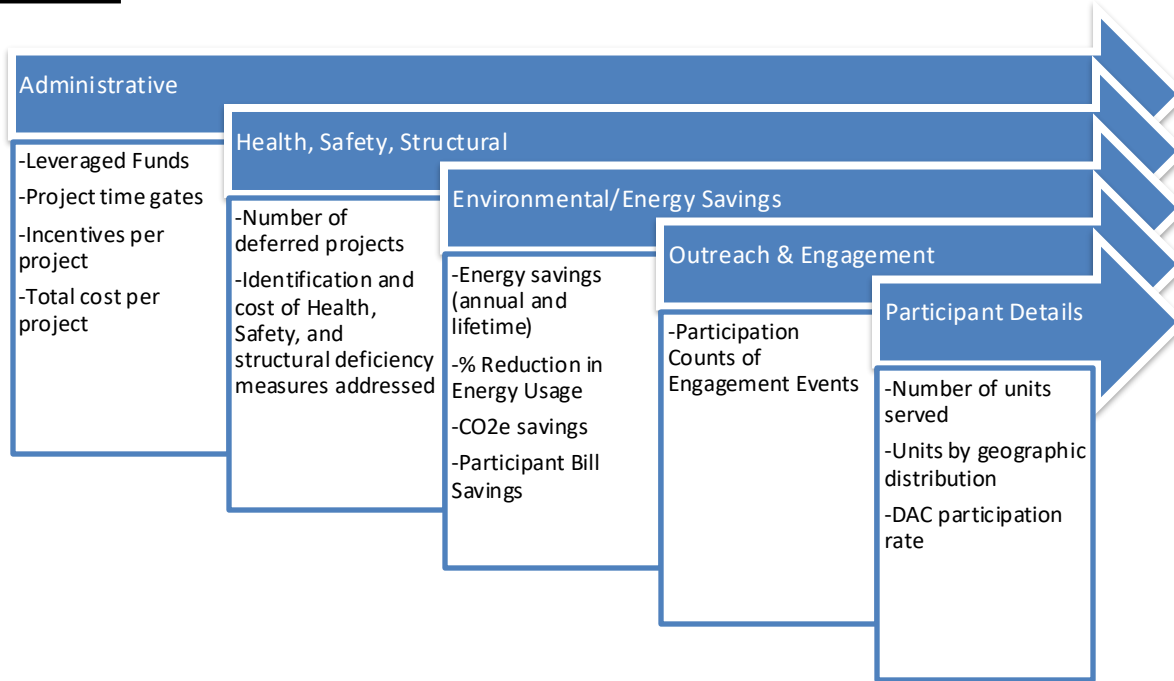
- Average Incentive and Savings per Project
- Customer Contribution per Project
- Incentive Paid per project, average
- Outside Funding Sources Incentive/Project Average

Outcomes

- Improved Energy Affordability
- Increased Administrative Efficiency
- Increased Participation
- Increased Measure Adoption
- Increased Customer Comfort
- Decreased Energy Usage
- Decreased CO2e

Program Level Impacts

Metrics:



Outcomes:

- Improved Participant Experience
- Improved Contractor Experience
- Improved Program Efficiency
- Improved Market Penetration

Participant-Level Impacts

Environmental/Energy Savings

- Decarbonization -- CO2e savings
- Deemed Participant Bill Savings
- Reduced energy demand per home

Project Details

- Average Incentive and Savings per Project
- Average Loan
- Average Customer Contribution per Project
- Reduced energy burden for vulnerable households
- Cost reduction when fuel switching

Other

- How many hours does an application take from start to finish
- Customer contribution and number of projects that get done related to that

Outreach and Engagement

- Participation Counts of Engagement Events

Outcomes

- Reduce energy consumption and cost for households experiencing the greatest energy burden
- Simplify participation and administrative burden for applicants and contractors;
- Ensure clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets.

How do we use program metrics?

- What are the most common uses for these metrics in your line of work?
- Are there analyses or other complimentary data points, that if available could support your work?

Next Steps

1. Upcoming Perf Management Meetings:
 - Friday, August 22- 9:00am- 11:00am: Reporting & Access to Information
 - Tuesday, August 26- 1:00pm- 3:00pm: Ongoing Stakeholder Engagement
2. DPS Staff to distribute a summary of metrics identified in webinar discussions for stakeholders to provide additional input on.
3. September 12, 2025 DPS Staff Filing on Performance Management Framework
4. Webinar participants are able to follow up with additional thoughts on the performance management process for the LMI Portfolio and programs via email at Equity@dps.ny.gov using the subject line: LMI Performance Management
5. Development/updating of Staff Guidance- Meeting in September

Appendix

2. Reporting and Accessibility

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

3. Stakeholder Engagement

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

DPS Staff additionally propose:

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

Discussion:

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



**Department
of Public Service**

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of Public Service**

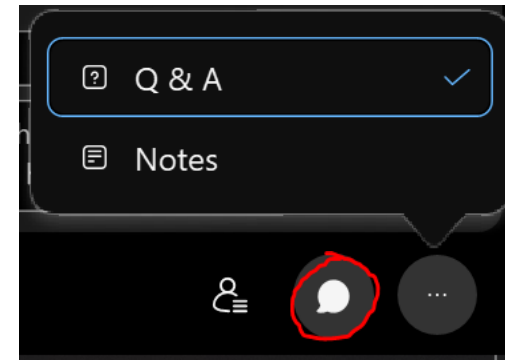
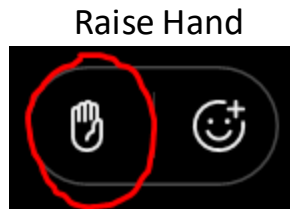
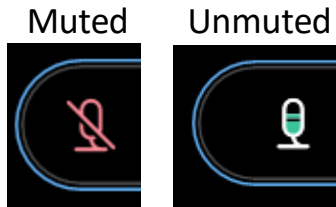
LMI EE/BE Performance Management Framework

Webinar Discussion: Reporting and Access to Information

August 22, 2025

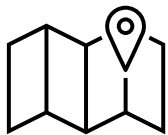
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Agenda

1. Overview of Performance Management Process
2. Recap of July 7 Discussion on Reporting and Accessibility
3. Overview of Current Reporting Structure and Process
4. Open Discussion
5. Next Steps



Quick Poll!

- Do you use the LMI Implementation Plan?
- Do you use the LMI Program Manuals?
- Do you use both?

Goals for Today

1. Increase access to currently reported metrics and data
2. Increase transparency of how Staff receives and utilizes data

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



Performance Management

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Recap 7/7: Reporting and Accessibility

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

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

Out of 25 responses-

(7)- Unaware of Sources

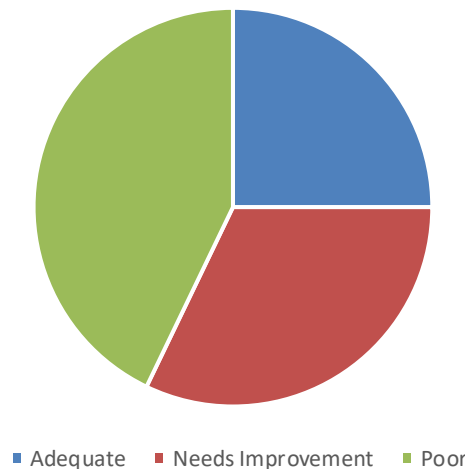
(3)-DMM - Two responses noted difficulty in access.

(2)-Open Data.

(3)- Direct Conversation.

Others included Hubs, internet searching, clean energy dashboard, PA reports etc.

How Would You Rate Accessibility to Portfolio and Program Data?



Survey Results Summary

I'm not sure how to find program information

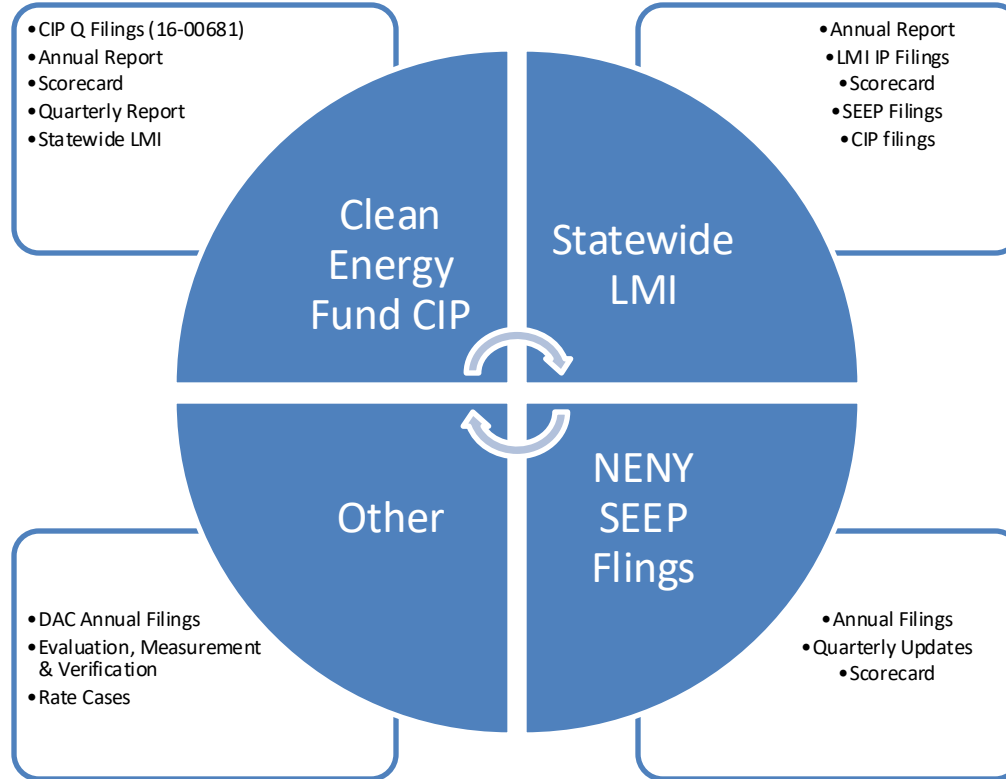
I do access things on the DMM. However, when the data is in multiple filings from multiple program administrators and not in the same format, it makes analysis very time consuming

I have tried to use NY Open Data, but it is difficult to navigate.

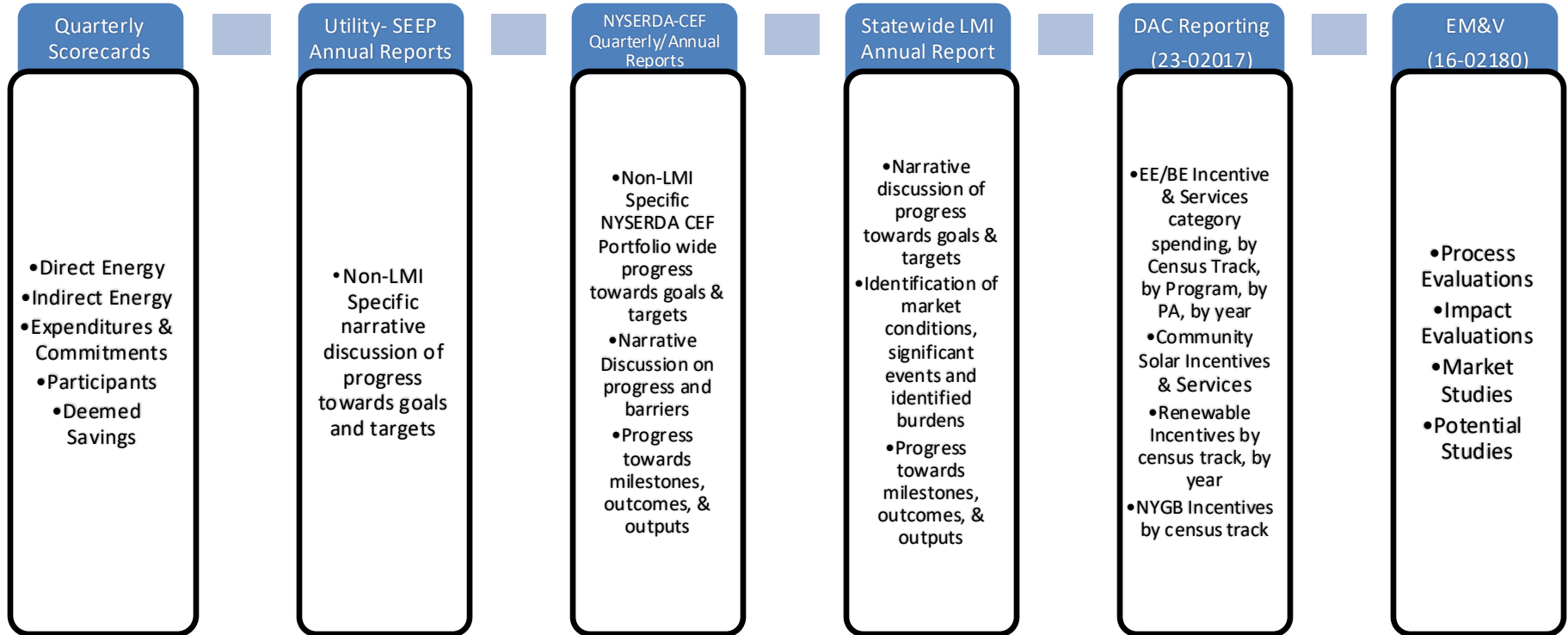
Filings in DMM from each utility have obscure names and there are so many that it's hard to know what you're even looking for unless you've studied all the acronyms ahead of time.

Existing Structure of LMI related Implementation Plans and Reports

Current Reporting Structure



Existing Pathways to EE/BE & LMI Reporting



Spotting Opportunities Pre-2026

Long Cycle Times (QA/QC) of Implementation Contractor data lags reporting to PAs; PA filings to DPS

Workarounds- single requests/data gap filler requests for review of data; verification of data

Significant Reviews (new processes, like CE Dashboard; DAC reporting systems; incremental funding additions, merging of programs)

Duplicate Data Entry (Rate Case filings, EE/BE filings; etc.)

Process ownership confusion; re-aggregation; QA/QC;

Multiple Reconciliations- Re-filings

Customer Confusion / Dissatisfaction

Order Directives for Process Improvements

25-M-0249 Order Improvements Identified

The LMI Order (and Non-LMI Order)

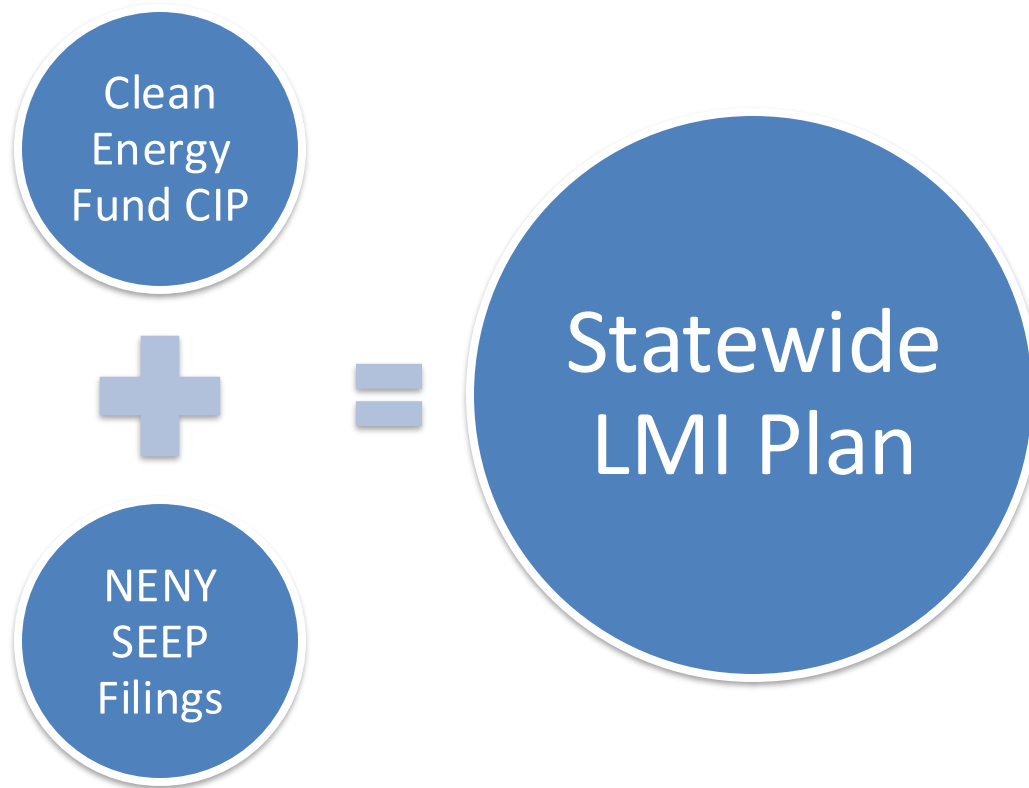
- Establishment of a stand-alone Matter 25-M-0249
- The Commission directs DPS Staff to conduct a review of the current EE/BE reporting, planning and tracking requirements and processes to determine which, if any, meet the needs of the 2026–2030 EE/BE portfolios.
 - This review shall include, but not be limited to, the quarterly scorecards, utilities' SEEPs, NYSERDA's CIP, VGS Specifications, Annual Reports, and the CE-Dashboard.
 - DPS Staff should prioritize the usefulness and usability of the planning, performance, and evaluation efforts, and ensure that the final recommendations from the contractor(s) also set forth a process or processes whereby lessons learned, best practices, and program insights are efficiently and reliably incorporated into DPS Staff guidance, program and portfolio planning, and the Technical Resource Manual.

25-M-0249 Order Improvements Identified

The LMI Order (and Non-LMI Order)

- To aid DPS Staff in its efforts, the Commission sets forth the following reporting principles:
 - EE/BE Scorecards, will act as the definitive source of performance data.
 - The filing schedule for the various required reports and filings should minimize the need for ongoing corrections to reported data while also ensuring that information regarding portfolio performance, planning, and analysis is done within a timely manner.
 - Further, the scale, scope, and complexity of the information contained within the filings should strike an appropriate balance between collecting all possible information and the information necessary to support regulatory oversight, provide transparency for stakeholders, and ensure program administrator accountability.
 - Any planning documents should demonstrate how the PA intends to achieve the cumulative Commission authorized budgets and targets.
- DPS Staff to develop a performance management framework to improve ability to track progress towards Commission objectives and improve accessibility for public.

Statewide LMI Plan- Mapping



LMI Implementation Plan/Annual Report

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

LMI Implementation Annual Report Granularity

Example:

The Narrative Annual Report provides additional details beyond the Scorecard

14. Appendix C: Measure Mix by Program Administrator

1-4 Family Homes (MWh)

Program Administrator	2024 MWh Savings	Lighting	Appliances	Building Shell	Domestic Hot Water	Domestic Hot Water - Control	HVAC	HVAC Control	Motors and Drives	Other
Central Hudson	55	21%	21%	44%	2%	0%	12%	0%		
Con Edison	108	46%	28%	27%	-1%	0%	0%	0%		
NYSERDA	3,983	35%	1%	71%	-7%	0%	-16%	1%		14%
NYSEG	339	28%	24%	35%	9%	0%	2%	0%		1%
National Grid (NMPC)	333	27%	27%	29%	0%	0%	8%	1%		9%
Orange & Rockland	262	30%	43%	23%	0%	0%	0%	3%		1%
RGE	171	34%	40%	12%	7%	0%	4%	0%		2%
Total	5,251	34%	8%	61%	-5%	0%	-12%	1%	0%	11%

1-4 Family Homes (MMBtu)

Program Administrator	2024 MMBtu Savings	Lighting	Appliances	Building Shell	Domestic Hot Water	Domestic Hot Water - Control	HVAC	HVAC Control	Motors and Drives	Other
Central Hudson	763			97%	0%	0%	1%	1%		
Con Edison	3,973			97%	0%	1%	0%	2%		
National Grid (KEDLI)	12,476			57%	23%	4%	12%	4%		
National Grid (KEDNY)	724			99%	0%	0%	0%	0%		
NFG	15,786			66%	7%	0%	25%	2%		
NYSERDA	216,663		0%	69%	4%	0%	25%	2%		
NYSEG	7,137			86%	3%	0%	10%	1%		
National Grid (NMPC)	13,254		0%	78%	5%	1%	13%	3%		
Orange & Rockland	3,885			92%	0%	3%	1%	3%		
RGE	2,966			67%	8%	1%	21%	3%		
Total	277,628	-	0%	70%	5%	1%	22%	2%	0%	0%

LMI Implementation Annual Report Granularity

Example:

The Narrative
Annual
Report
provides
additional
details
beyond the
Scorecard

[5.1.4 RetrofitNY](#)

In 2018, under the first RetrofitNY pilot round, NYSERDA selected six design-build teams to each design a retrofit solution for a specific building. All designs were completed in 2019, and the first pilot project started construction in mid-2019. RiseBoro Community Partnership owns the project, part of the Casa Pasiva development. The design team was led by Chris Benedict, R.A. HCR, NYC HPD and NYSERDA financed the project. The construction faced some delays due to COVID-19 and was completed in November 2022. The second awarded project is located in Phoenix NY and is anticipating completing construction in Q1 2025.⁴⁶ In addition, NYSERDA released a round-2 solicitation in November of 2021 totaling \$5 million. The only project under round 2 has completed the design phase and has closed on its financing. The project is scheduled to begin construction in Q1 2025 on two buildings totaling 16 units in NYC. Construction completion is anticipated at the end of 2025.

LMI Implementation Plan/Annual Report

<https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=18-M-0084>

8/15/2025 Filing (for remainder of 2025)

Implementation Plan:

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={60FEAD98-0000-CB34-A93F-5FCE9AE7256A}>

VGS Specifications:

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={60FEAD98-0000-CF2B-8DA1-01BF10C93968}>

LMI 2024 Annual Report:

<https://documents.dps.ny.gov/public/Common/ViewDoc.aspx?DocRefId={D04BF195-0000-C411-8D35-1ABFB4CD9312}>



Hints:

Control + F Terms:

- “LMI”
- “LMI Statewide”

Filters- Document Type



Microsoft Excel
Worksheet

Open-NY Clean Energy Dashboard

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

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

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Filter by Program

Filter by PA

Filter by Portfolio

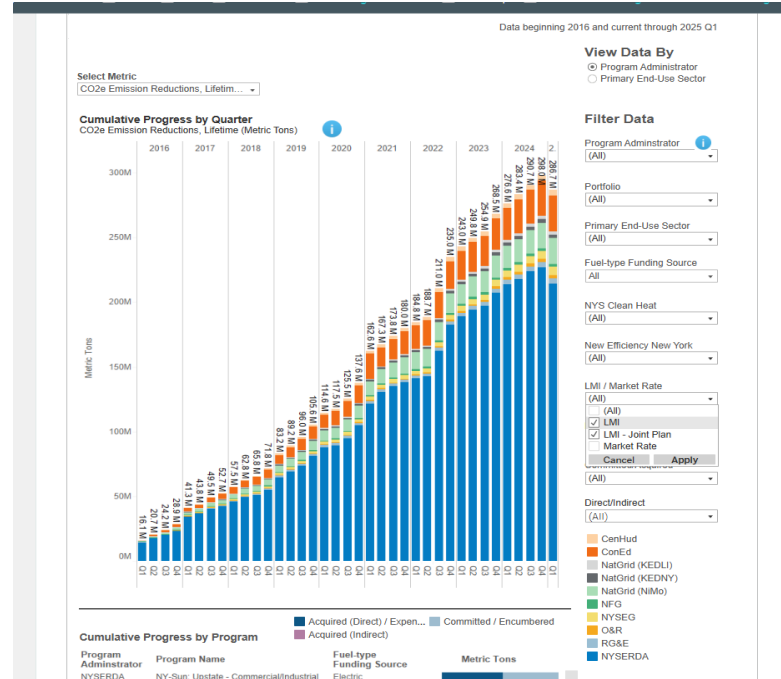
<https://www.nyseda.ny.gov/About/Tracking-Progress/Clean-Energy-Dashboard>

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)



Discussion

Discussion

1. Beyond the current reports, processes, and data repositories, are there other ways that you would prefer to receive information on program performance? Please describe.
2. Do you find the presentation of program performance information in a quantitative or qualitative way, to be most useful for your purposes?
3. What is your primary recommendation for improving access to information on program performance?
4. Other input on how we can improve access to information on program performance?

Next Steps

1. Upcoming Perf Management Meetings:
 - Tuesday, August 26- 1:00pm- 3:00pm: Ongoing Stakeholder Engagement
2. DPS Staff to distribute a summary of metrics identified in webinar discussions for stakeholders to provide additional input on.
3. September 12, 2025 DPS Staff Filing on Performance Management Framework
4. Webinar participants are able to follow up with additional thoughts on the performance management process for the LMI Portfolio and programs via email at Equity@dps.ny.gov using the subject line: LMI Performance Management
5. Development/updating of Staff Guidance- Meeting in September



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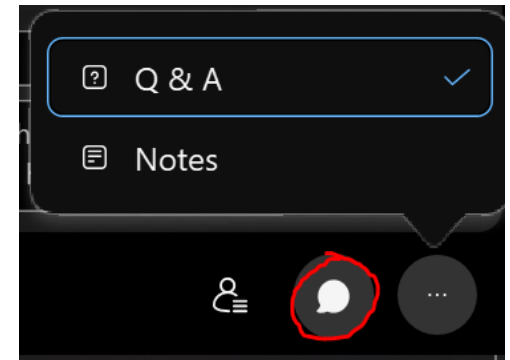
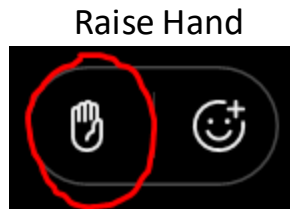
LMI EE/BE Performance Management Framework

Webinar Discussion: Ongoing Stakeholder Engagement

August 26, 2025

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Agenda

1. Overview of Performance Management Process
2. Review of 7/7 Discussion on Stakeholder Engagement
3. DPS-Led Engagement
4. Open Discussion
5. Next Steps

Goal for Today

1. Discuss approaches to improve engagement on the LMI EE/BE portfolio

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



Performance Management

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 - 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)
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Review of 7/7 Discussion on Stakeholder Engagement

Recap 7/7: Stakeholder Engagement

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

Recap 7/7: Stakeholder Engagement

What are the opportunities for improving engagement on LMI programs and the overall LMI portfolio?

- Improved Data Visualization & Digital Accessibility (2)
- Greater and Continuing Inclusion in Program Design (3)
- Regular Meetings Between Hubs, PA's and Stakeholders (4)
- Participant Focus Groups (2)

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

- Customer Help Line
- Dashboard
- Focus Groups
- Email Blasts
- PA Websites

- Let's expand on your feedback and discuss further. Comment in the Q&A or raise your hand to start the conversation.
- Share additional context or reaction.
- React and respond to each other's comments respectfully.



Recap 7/7: Stakeholder Engagement

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

- Hubs
 - Coordinate Hub meeting time with decision making timelines.
 - Increase collaboration between hubs and contractors.
- Contractors
 - Increase engagement by DPS.
 - Increase collaboration with Hubs.
- PA's
 - Streamline program offerings in PA websites.
- Others
 - Support meetings by other groups.

- Let's expand on your feedback and discuss further. Comment in the Q&A or raise your hand to start the conversation.
- Share additional context or reaction.
- React and respond to each other's comments respectfully.

DPS- Led Engagement

Objectives of DPS-Led Engagement on LMI EE/BE Portfolio

1. Focused on LMI Portfolio, performance of programs, and related policy issues; PAs responsible for ongoing engagement on programs
2. Improve transparency of LMI EE/BE performance and improve access to information useful to stakeholders.
3. Elicit insightful and actionable feedback from stakeholders relevant to the 2026-2030 LMI EE/BE Portfolio to address challenges in program implementation
 - Increase participation among those serving/representing Disadvantaged Communities, market participants, and those who have not traditionally engaged with DPS.
4. Complement program-specific engagement conducted by program administrators and coordinate with existing engagement initiatives
5. Make efficient use of stakeholder time invested in discussions while also improving DPS Staff understanding of issues.

DPS Led Engagement on LMI EE/BE Portfolio

DPS Staff considering the following approach:

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 (e.g. topic-specific working groups) with Regional Clean Energy Hubs, Energy Equity Collaborative, and PA-led program-specific engagement.

Discussion

Discussion

1. Do you have feedback on the objectives outlined for the DPS-led engagement?
2. Do you feel the Staff-proposed strategy is equitable, balanced, and appropriate?
3. Which elements would you be most interested in? Which elements would you have concerns about? Are there elements that are not included, that should be? Please elaborate.
4. What are some key questions Staff should contemplate when selecting a facilitator?

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Next Steps

1. September 12, 2025 DPS Staff Filing on Performance Management Framework
2. Webinar participants are able to follow up with additional thoughts on the performance management process for the LMI Portfolio and programs via email at Equity@dps.ny.gov using the subject line: LMI Performance Management
3. Development/updating of Staff Guidance- Meeting in September

Thank You