Upstate Regional Residential Weatherization Contractor Roundtable

September 24, 2026











Agenda

- Welcome & Introductions
- Program Framework
- Program Design Overview
- Participating Contractor Requirements
- Contractor Feedback: Guided Roundtable and Q&A
- Next Steps & Closing: Incorporating contractor feedback into Nov 1 Implementation Plan

Meeting Procedures and How to Participate

- **All attendees are muted.**
- **Q&A/Slido**
  - Access the Q&A function through the **Slido** app. You may see a Slido button at the bottom of your screen, or select "Apps" to find the Slido panel.
  - The written Q&A function will be monitored throughout the webinar and panelists will provide responses as appropriate.
  - The Chat function is disabled for this webinar so that all questions and comments can be gathered in one place for the panelists to respond. Please use the Q&A feature to submit questions and comments.
- **Raise Hand:**
  - Select the Raise Hand icon in the bottom toolbar. Click on the raise hand icon to indicate you have a question or comment.
  - When the moderator calls on you and indicates you are unmuted, you may ask your question or make your comment verbally. When you are finished talking, please select the "Raise Hand" icon again to lower your hand
- **Polling**
  - For content on several slides, the PAs will ask a polling question. The questions will appear on your screen in the Slido panel, one at a time, as the moderator launches and closes each question.
  - If you navigate away from the active polling question, you can return to it by clicking on the Slido button and selecting the Polls tab.
- **Post-Webinar Survey**
  - If you would like to provide additional information beyond what we have time for during the webinar, please complete the post-webinar survey which will appear in your web browser when you exit the meeting.
- **Presentation Materials**
  - The PowerPoint deck and presentation materials will be circulated. This Webinar is being recorded for purposes of accurate note-taking, but will not be circulated.
- If technical issues arise, please contact StakeholderEngagement@ceadvisors.com

"Slido" or "Apps" for Q&A and Polling



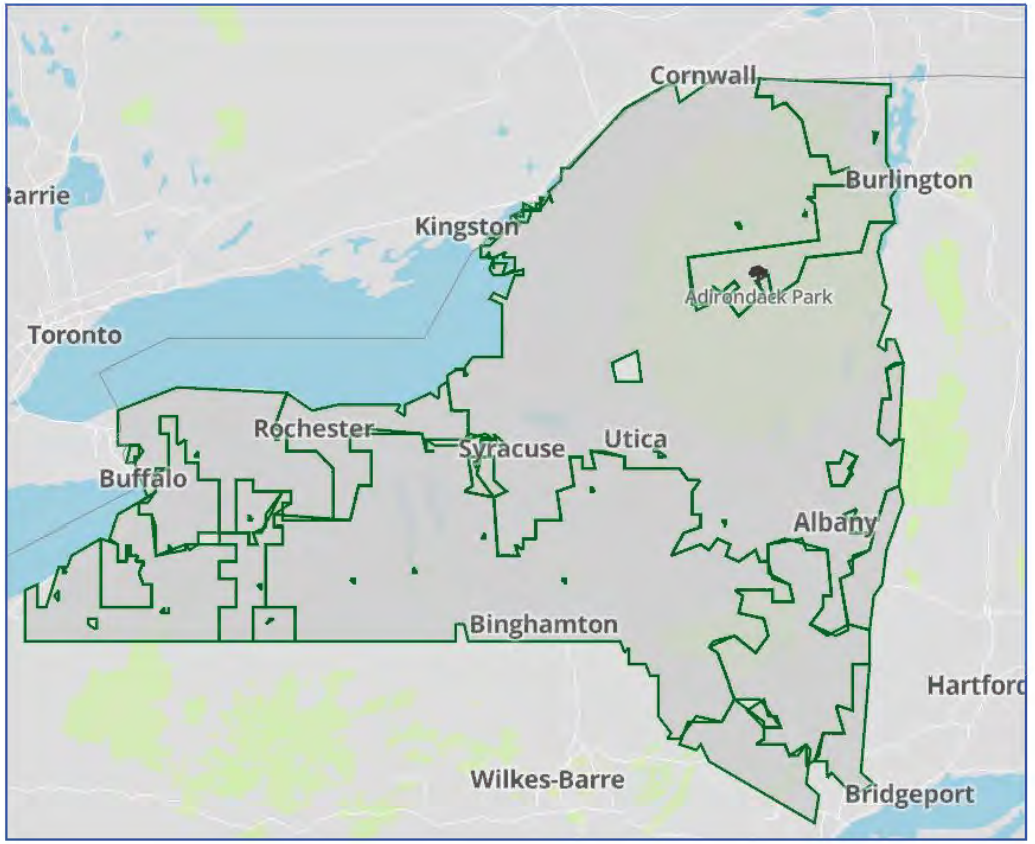
Introducing!

- **Comfort Ready Upstate NY** – Covers communities across Upstate New York, including the Capital Region, Hudson Valley, Central New York, Western New York, Southern Tier, Mohawk Valley, North Country, and Finger Lakes regions

- **Comfort Ready Metro** will be administered separately downstate by Con Edison and National Grid (KEDNY/KEDLI) – covering communities in Westchester, NYC, Long Island

Comfort Ready Upstate NY: Regulatory Overview

- Participating Utilities & Service Territories: National Grid, NYSEG/RG&E, Central Hudson, Orange & Rockland, and National Fuel Gas



Source: New York State Department of Public Service

Comfort Ready Upstate NY: Coordinated Program Offering

- Comfort Ready UNY replaces the current patchwork of weatherization programs for market-rate customers with a standardized regional program:
  - Common incentives, contractor requirements, QA/QC processes
- The objective is to create a single, streamlined weatherization market that reduces customer confusion, improves consistency across UNY territories, and better supports electrification readiness
- This is a jointly managed program for all UNY utility customers:
  - Pooled budget available to all customers
  - Single application even if a customer is served in different service territories

Forecasted Budgets	Estimated Incentive Spend 2027-2030	Estimated Number of Projects 2027-2030
UNY Utilities	~$285 million	~70,000

Proposed Program Launch Timeline

- **November/December 2026**: Share Program Manual with contractors enrolled in existing weatherization programs (*i.e.,* Comfort Home, EmPower+, HIASP) and begin recruiting efforts to enroll contractors in Comfort Home UNY

- **January 2027**: Release final Program documents and start accepting applications
  - *Note: Only installs performed in 2027 will be eligible for this program*

Transition to Regional Residential Weatherization Programs (RRWP) – 2027

- RRWP's plan to launch in January 2027 as the primary market-rate residential weatherization programs (UNY & DNY)
- Existing programs, including Comfort Home, Weather Ready, HIASP, and other utility-administered weatherization offerings will wind down in 2026
  - *Deadlines may vary among existing programs*
  - *Comfort Home will continue to accept new applications until RRWP's launch*
  - *Please consult directly with program administrators of existing programs for details*

Key Message:
2026 is the transition year; beginning in 2027, RRWPs become New York's primary market-rate residential weatherization programs.

Program Design Overview

Customer Eligibility



Single-family home or small multifamily property (1–4 dwelling units)



Customer fits into one of the following categories:

- **Heats primarily with natural gas** provided by a participating UNY utility (National Grid, NYSEG, RG&E, Central Hudson, Orange & Rockland, or National Fuel Gas)
- **Heats primarily with electricity** provided by a participating UNY utility (National Grid, NYSEG, RG&E, Central Hudson, or Orange & Rockland)
  - *i.e., electric resistance heating, air source heat pumps, or geothermal heat pumps*
- **Heats primarily with a delivered fuel** and receives electric service from a participating UNY utility
  - *i.e., fuel oil, propane, kerosene, wood, etc.*

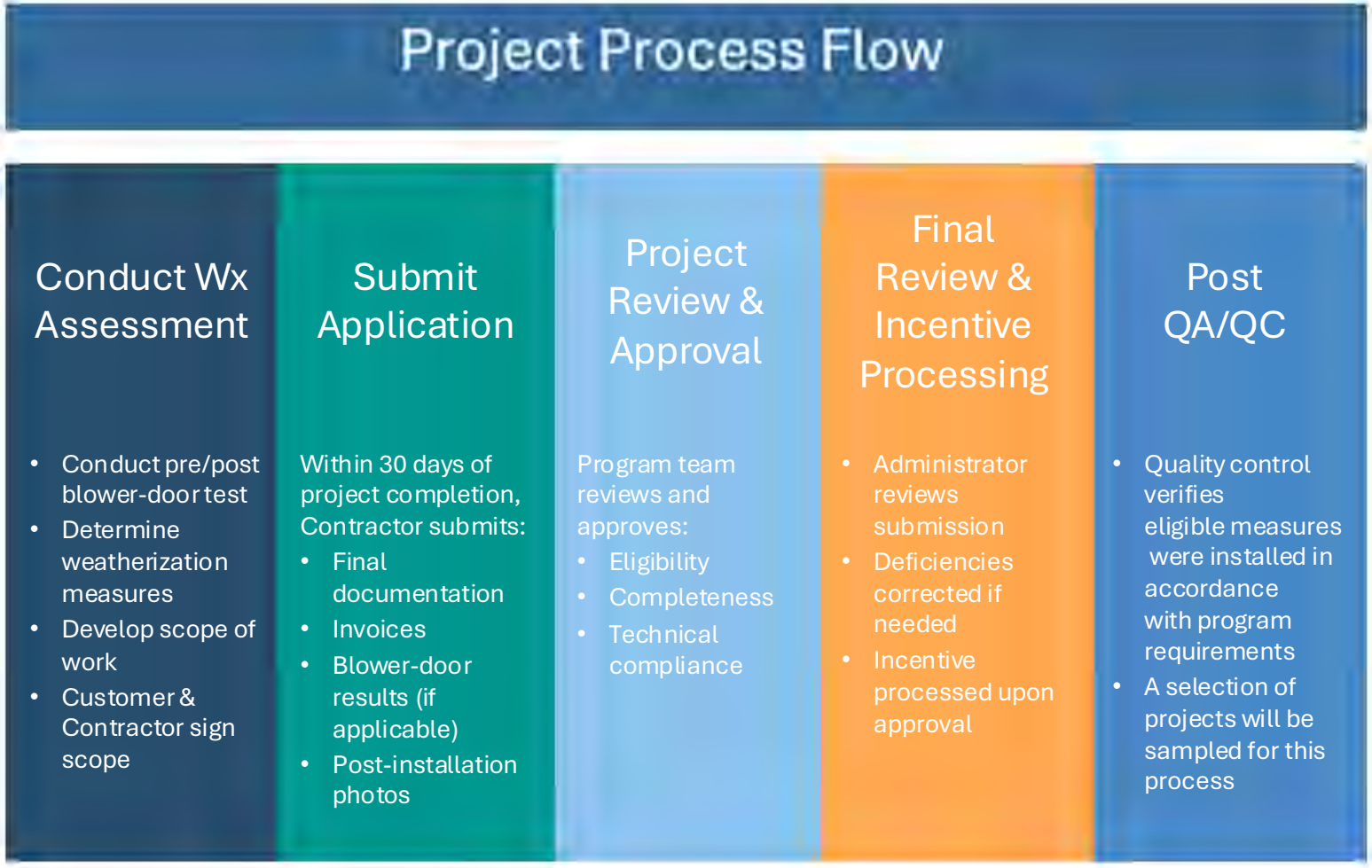


The home must <u>not</u> be:

- New construction (a home that has never been occupied)
- Major rehabilitation project (a renovation impacting more than 50% of the home)

Detailed eligibility requirements will be captured in the **Comfort Ready Upstate New York Program Manual**.

Application Lifecycle Overview



Detailed application requirements will be captured in the Comfort Ready Upstate New York Program Manual.

Measure Packages and Incentive Offerings

Packages	Required Measures	*Proposed Incentives
Comfort Ready Basic	• Air sealing • Attic insulation • Rim joist insulation	• **$3,250** or 40% project cost cap, whichever is lower

Comfort Ready Enhanced	• **All Basic packages measures +**
	• Exterior wall insulation
	• And 1 'other' measure:
	  • Garage ceiling
	  • Garage walls (to living space)
	  • Crawlspace/basement ceiling
	  • Crawlspace/basement wall
		• **$4,250** or 40% project cost cap, whichever is lower

- **Customer incentives** are up to a maximum dollar amount (per package) or 40% of the total project cost, whichever is lower
  - All customers receive the same incentive (DAC & non-DAC)
  - Incentives are at the project level; goal is to weatherize the entire building shell for single-unit and 2-4-unit dwellings

**Incentives are currently "proposed"; final approved incentives will be captured in the Comfort Ready Upstate NY Program Manual*

Proposed Basic and Enhanced Packages for Launch

How were the customer incentive levels chosen?

- Non-LMI incentives must be less than EmPower+ UNY moderate-income incentives: up to $6,000 or 50% of the project cost
- Incentive caps were tested against estimated average project costs of approximately **$9,000** (Basic) and **$11,000** (Enhanced)
- Proposed incentive maximums of **$3,250** (Basic) and **$4,250** (Enhanced) remain below the 40% cap compliant with regulatory requirements
- As a result, maximum incentives represent approximately **~36%** and **~39%** of average project costs respectively

Checking Incentive Caps	Basic Package	Enhanced Package	Notes
Estimated Average Project Costs	$9,000	$11,000	*Based on preliminary Comfort Home project cost data for the Upstate Utilities*
40% Project Cost Cap	$3,600	$4,400	*40% of estimated average project costs*
Max Customer Incentive	$3,250	$4,250	*Proposed customer incentive maximum*
Max Incentive % Project Cost	**36.1%**	**38.6%**	*Set max incentives slightly lower than ordered 40% cap to ensure compliance*

Financing Options

- Program financing should leverage existing public financing resources, including Green Jobs Green New York (GJGNY)
- The Commission does not approve utility-administered financing programs at this time
- Contractors may offer other third-party financing options to customers

Participating Contractor Requirements

Contractor Onboarding Requirements

Submit:

- Signed *Participating Contractor Agreement*
- Certificate of Insurance
- Completed W-9 Form
- BPI Cert Requirements
  - BPI Building Analyst Technician (BA-T)
  - BPI Building Analyst Professional (BA-P)
  - BPI Energy Auditor
  - BPI Quality Control Inspector
- Active county home improvement license

Complete required Onboarding Orientation which will cover:

- Program participation requirements
- Technical installation and weatherization standards
- Customer service and communication expectations
- Safety protocols + disciplinary process
- Program documentation, reporting, and quality assurance procedures

Contractor Allocations

To manage program budget and provide Participating Contractors with clarity on budget availability, the program will implement the following budget allocation structure:

Individual Budget Allocations for high-volume Participating Contractors

- Assigns a fixed quarterly allocation to each high-volume contractor
- Funds will be deducted from the allocation upon submission of final applications

Funding Pool for lower-volume Participating Contractors

- Shared budget will be available on a first-come, first-served basis
- Funds will be deducted from the allocation upon submission of final applications
- Participating Contractors in the Funding Pool will have visibility into the remaining available pool balance

Guided Contractor Roundtable

Program Design:

What are your impressions of the proposed measure packages and incentive levels? What would you change, if anything?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





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Program Design:

How should the program treat customers who have previously completed some, but not all, measures required for a basic or enhanced package?

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Program Design:

What does it typically cost to perform an energy assessment with blower door testing, what reimbursement level would be appropriate, and what assessment standards should the program adopt?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Program Operations:

What EmPower+, Comfort Home, or HIASP requirements should RRWP adopt, and which should RRWP avoid?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Program Operations:

What aspects of the QA/QC inspection process in other programs provide the greatest value, and where do you see opportunities to reduce burden for contractors and customers without compromising quality?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Workforce Development:

Based on the proposed onboarding requirements (*i.e.*, BPI certification, home improvement license), what requirements pose a challenge to meet?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Contractor Onboarding Requirements

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Complete required Onboarding Orientation which will cover:

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- Safety protocols + disciplinary process
- Program documentation, reporting, and quality assurance procedures

Workforce Development:

What utility resources, tools, or program enhancements would help contractors increase weatherization project volume or support workforce development?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Contractor Participation:

How should referrals among RRWP, EmPower+, and NYS Clean Heat be structured to minimize customer drop-off and maximize completed projects?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Contractor Participation:

Would the availability of an aggregator pathway increase your likelihood of participating in the program?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Contractor Participation:

What is your familiarity with HomeBoost or an alternative DIY assessment tool? Have you used it before, and would you consider using HomeBoost to conduct assessments? Do you believe it would support and improve your current business practices, or could it create challenges or inefficiencies?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Final Feedback:

What is the most important feedback you'd like the utilities and DPS to take away from today's discussion?

TYPE YOUR RESPONSE IN THE SLIDO PANEL.





Q&A (Questions from the Slido Q&A)

Next Steps

- The program teams will review the discussions, feedback, and suggestions from today's session as we finalize program design to be detailed in the Implementation Plan filed November 1st, 2026
- If you have any other feedback you did not get a chance to share today, please email StakeholderEngagement@ceadvisors.com by Monday, October 5th so we can consider all feedback for the Implementation Plan
- Stay tuned for upcoming Comfort Ready Upstate NY information sessions to be announced as we get closer to launch

Thank you!

National Grid
George Angevine:
george.angevine@nationalgrid.com

Central Hudson
Aisha Kutter:
akutter@cenhud.com

NYSEG/RG&E
Kassi Murphy:
kmurphy@nyseg.com

Orange and Rockland
Andrew Clough:
cloughan@oru.com

National Fuel Gas
Andrew Emhof:
emhofa@natfuel.com