Department of Public Service

Thank you for joining!
The webinar will begin shortly.

NEW YORK STATE OF OPPORTUNITY. Department of Public Service

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

Q1 2026 Performance & Stakeholder Forum

May 6, 2026

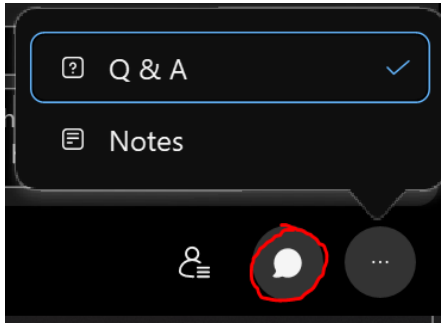
Housekeeping

- Run time: 10:00AM-12:30PM
- Participants are muted upon entry in moderated unmute mode. Hosts may end moderated unmute mode for group discussions.
- Chat is enabled for participating in discussions but may not see questions posted there.
- Please use the Q&A feature or raise hand feature to ask a question. Staff will follow-up any unanswered questions in the Q&A following today's webinar.
- Materials from today's webinar, including slides and summary notes, will be posted to DMM: 25-M-0249

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. Review & discuss the transition from CEF and NE:NY to the LMI EE/BE portfolio
2. Explore opportunities for increasing impact of programs
3. Identify & discuss emerging issues related to the LMI market segment
4. Delineate feedback opportunities to respective PA channels
5. Discuss how the quarterly forums can be most useful to participants

What would you like to get out of these Forums?

Let us know at equity@dps.ny.gov

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Today's Agenda

1. Introductions/Housekeeping
2. Introducing the Quarterly Forums
3. Discuss Opportunities for Further Engagement on the LMI EE/BE Programs
4. Closeout of the Clean Energy Fund and New Efficiency: New York Funding Cycles and Transition to the EE/BE Portfolio
5. Upcoming Forums and Future Topics

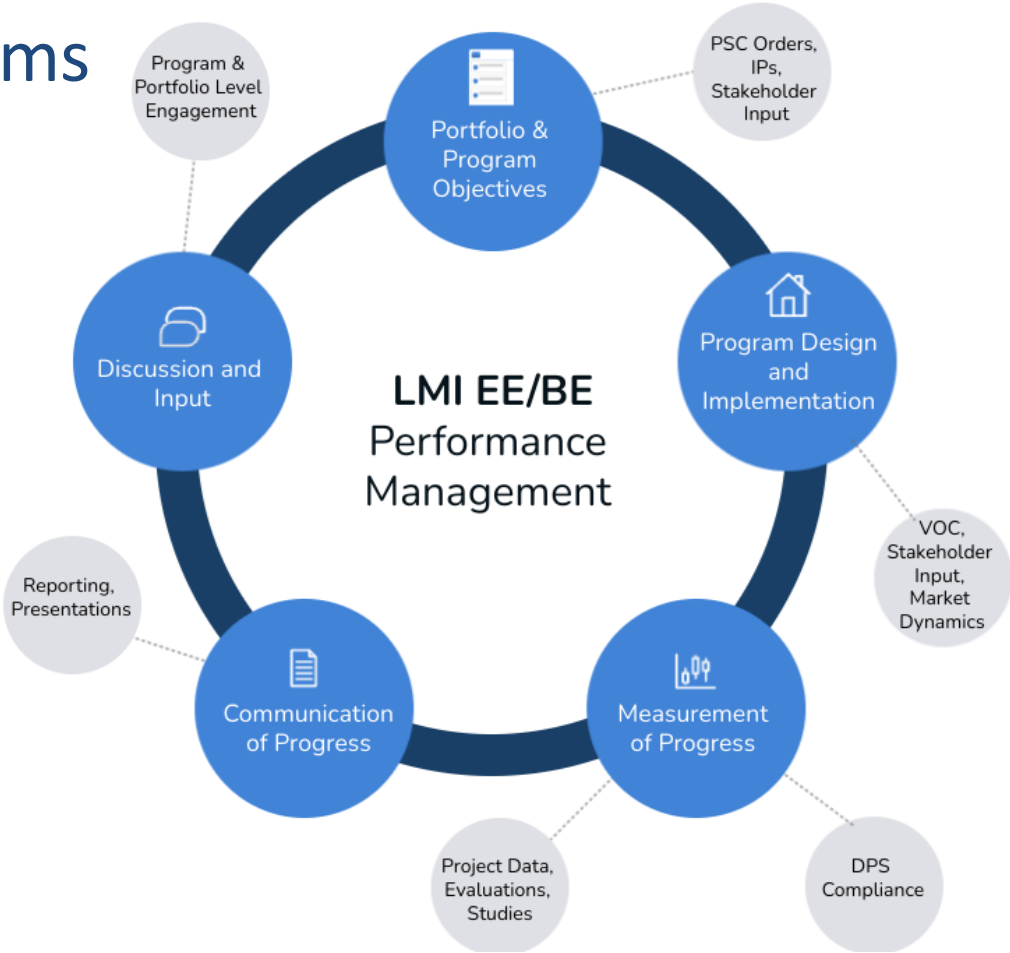
There is room for discussion throughout today's agenda.

We will aim for a break mid-way through.

Introducing the Quarterly Forums

LMI EE/BE Quarterly Forums

- Key element of DPS LMI EE/BE performance management process
- Improve awareness on how programs and the overall portfolio programs are doing
- Discuss emerging issues related to the LMI EE/BE portfolio of programs
- Inform continuous improvement of portfolio and programs



Forum Guidelines

Is…

- An open space to discuss progress towards objectives and goals
- For elevating new evidence, suggestions, and insights
- Time to earnestly and constructively examine barriers and obstacles
- Intersectional and multi-disciplinary
- Improving transparency and accessibility of publicly reported data and information
- An opportunity to talk collectively with all parties responsible for administering the portfolio

Isn't…

- For debating PSC decisions, advocating for legislation, or diatribes
- A place to guess or assume intentions
- Developing or revising program design
- Taking the place of program-specific engagement
- Intended to cover every detail and analysis during the meeting
- A place to single out or point fingers

Forum Structure

Standing Topics:

- Portfolio and program performance by quarter
- Intersectional barriers and opportunities to the Portfolio
- Portfolio objectives & policy context
- Wayfinding program-specific input opportunities and relevant filings
- Emerging issues and topical presentations

Stakeholder Suggested Topics To-Date:

- Contractor participation
- Implementation of the Strategic Framework
- Deeper analyses and breakdowns of LMI EE/BE reporting and performance metrics
- Unmet market needs (e.g. low-rise mixed use)
- LMI Electrification

Two in-person meetings annually

Guest Presentations

Open Discussions

Breakouts & Workshopping

Upcoming Forums

2026 Proposed Dates	
Date & Time	**Location**
May 6, 2026 10:00am - 12:30pm	Virtual
July 29, 2026 10:00am - 3:00pm	Albany
October 28, 2026 10:00am - 3:00pm	NYC
January 27, 2027 10:00 am - 12:30pm	Virtual

- Balancing in-person and virtual opportunities
- Hybrid option will be available for July and October, moderated by Staff on-site. Some parts of the agenda may be in-person only.
- Dates are tentative. Final dates, times, and locations will be noticed in DMM with instructions on how to register.
- Any known conflicts with these dates?

Additional LMI EE/BE Engagement Opportunities

Regional Clean Energy Hubs

- 13 Hubs across NYS, comprised of CBOs
- Public input via RABA & community outreach
- Collaboration with NYSERDA & Utilities

Energy Equity Collaborative

- Shared space for collaboration between those serving and representing historically marginalized communities
- Working Groups:
  - Building EE & Electrification
  - Workforce Development & Economic Opportunities
  - Energy Transition
  - Community Engagement and Access

DAC Consultant Pool

- Compensation for CBOs for their contributions to NYSERDA's policies, programs, and planning
- Mini-bids and direct contract requests on a variety of topics

Residential Market Advisory Group

- Quarterly meetings open to all parties with business interests aligned with enabling and providing energy efficiency and clean energy solutions to 1-4 unit existing homes

Contractor Networks

- BPCA, BPA
- Home Modernization Team Contractor Webinars
- NYSERDA Multifamily Contractor Network
- AMEEP Participating Contractors & Partners Webinars

Public Events

- Conferences, Fairs, Home Shows, etc.
- Stakeholder listening sessions hosted by Program Administrators

CleanEnergyHub @nyserda.ny.gov	EnergyAndClimateEquity @nyserda.ny.gov	PublicEngagement @nyserda.ny.gov	resmarket @nyserda.ny.gov	residential.programs @nyserda.ny.gov	PA Email Sign-Ups
nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs	RFQL 4922	RFQL 4922	nyserda.ny.gov/Residential-Market-Advisory-Group	AMEEP @ceadvisors.com mf.contractor.network @nyserda.ny.gov	PA Event Calendars

Delineating Meeting Topics

Quarterly Forums	PA-led Program Engagement

• Examples:
  • Portfolio and program performance relative to PSC objectives
  • Policy and program issues across portfolios and or PSC proceedings
  • Emerging issues
  • Strategies for for measuring impact of programs
	• Examples:
	  • Program incentive levels
	  • Program marketing
	  • Contractor eligibility
	  • Application processing
	  • Questions about program details

Pause for Discussion

Clarity?

Context?

Concerns?

Raise your hand, use the Q&A or email us at equity@dps.ny.gov

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Closeout of CEF & NENY and Transition to LMI EE/BE Portfolio

Ratepayer-Funded LMI Portfolio Background

2020-2025 LMI Portfolio

- $1 billion towards a Statewide LMI Portfolio jointly administered by NYSERDA and the utilities
    - NYSERDA Clean Energy Fund & Utility New Efficiency: New York Funds
    - Individual budgets and targets for each program administrator
- Over 83,000 LMI households served
- 2022 Staff report on EE/BE identified incongruence between administrative model and expectation for a unified approach for addressing LMI market needs
    - Significant administrative burden associated with coordinating across seven program administrators
    - Slower than expected deployment of funds

Ratepayer-Funded LMI Portfolio Background

Order Authorizing LMI EE/BE Portfolio for 2026-2030 (May 15, 2025)

- Shifted sole responsibility for LMI 1-4 family program administration to NYSERDA
- Con Edison, National Grid and NYSERDA share administration of downstate affordable multifamily programs; NYSERDA administers upstate affordable multifamily program
- Strategic Framework focuses funding on policy priorities (building shell; electrification)
  - 15% of LMI EE/BE program budgets to support LMI electrification
  - Up to 10% of LMI program budgets to remediate health & safety barriers
  - Limited allowances for lighting, appliances, and gas efficiency measures where they enable comprehensive projects/improve affordability for LMI customers
- NYSERDA Workforce Development and General Awareness & Education Activities funded through both LMI and Non-LMI portfolios
- Requirement for DPS Staff to increase oversight of the portfolio

LMI EE/BE Portfolio Objectives

- 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.

LMI EE/BE Portfolio Progress to Date

- May 2025- LMI EE/BE Order
- July 2025- Staff Report on the Transition of the LMI Joint Management Committee
- August 2025- Program Administrators file a Customer Referral Plan (CRP)
- September 2025- Staff filing of LMI EE/BE Performance Management Framework
- October 2025- Program Administrators submitted LMI Implementation Plan for review and approval
- December 2025- DPS Staff compliance letter on LMI Implementation Plan with direction to refile
- February 2026- Program Administrators refile the LMI Implementation Plan
- March 2026- DPS Staff compliance letter approving LMI Implementation Plan
  - Program Administrators commence launching new or modified program offerings
- Upcoming- DPS Staff Guidance on LMI Metrics and Reporting; DPS Staff compliance letter on CRP

Pause for Discussion

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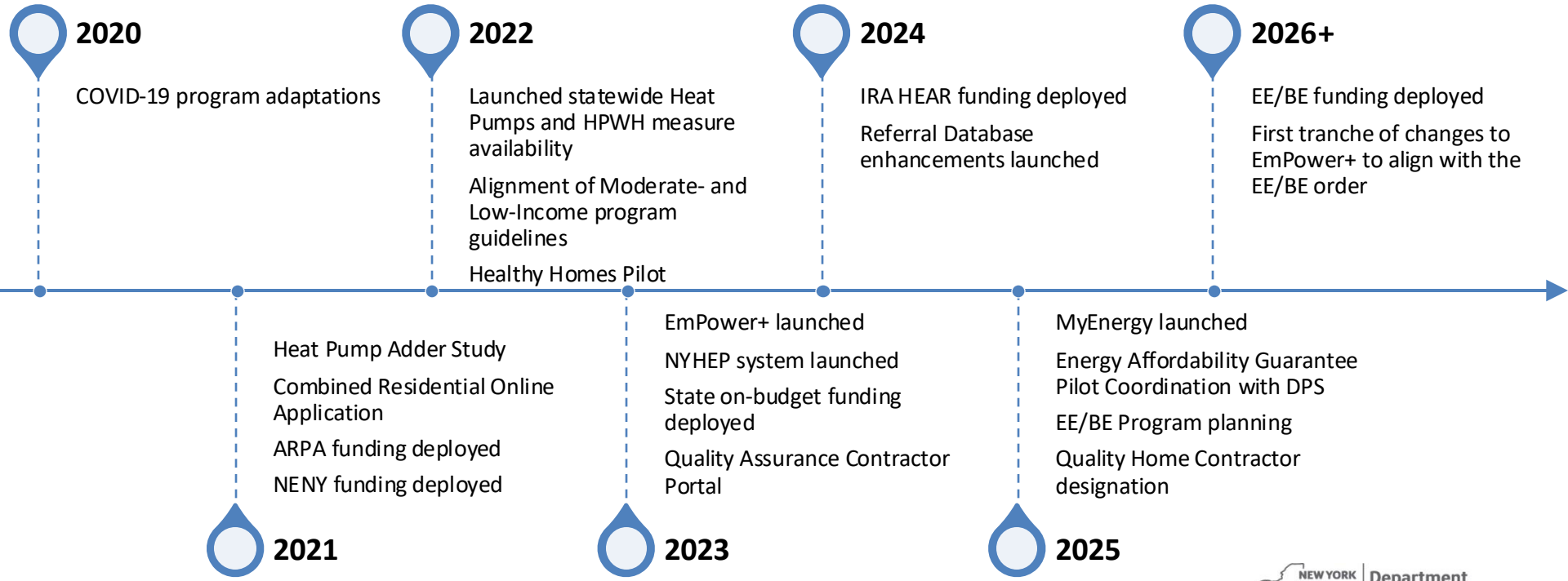
LMI 1-4 Family Residential

LMI 1-4 Family Residential



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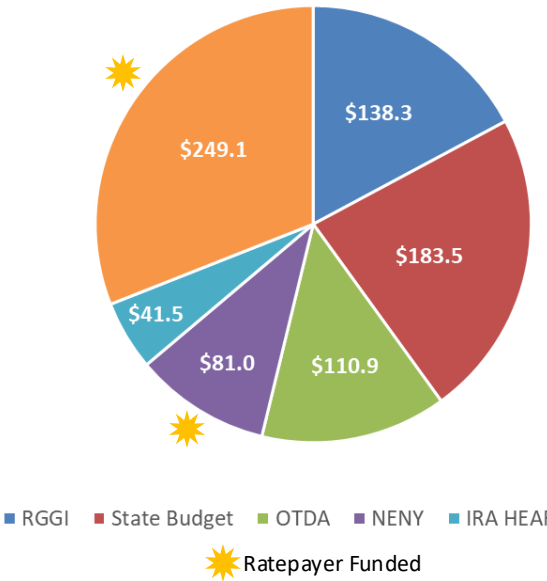
Total Funding Leveraged for 1-4 Family Residential

Funding Source	2020-2025 Program Expenditures	2020-2025 Total Energy Savings [1]	2020-2025 Projects Funded	Expenditures / Project[2]	Energy Savings / Project[1,3]
CEF	$249.1M	797,960	48,422	$5,143	16.5
NENY	$81.0M	230,246	18,359	$4,411	17.4
Other NYSERDA Administered Funding	$474.2M	1,686,600	80,220	$5,632	19.4
TOTAL	**$804.3M**	**2,714,806**	**128,917[4]**	**$6,239**	**21.1**

LMI Single Family Residential Funding 2020-2025 ($M)



1. Total Energy Savings = MMBtu-equivalent (MWh Savings + All MMBtu Savings)
2. Expenditures/Project = Sum of Incentives + Implementation divided by Participants (Units)
3. Savings/Project = Total Energy divided by Participants (MMBTU-e)
4. Total number of unique projects (Some projects receive multiple funding sources at the same address, resulting in duplicate project counts)

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LMI 1-4 Family Residential*

CEF	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($M)	$ 40.6	$ 59.4	$ 63.3	$ 16.0	$ 3.8	$ 35.4	**$ 218.5**
Total Program Expenditures ($M)	$ 47.1	$ 66.8	$ 72.1	$ 22.9	$ 4.9	$ 35.9	**$ 249.7**
Participants [DI 11%/Comp 89%]	9,155	13,510	12,996	3,991	1,362	7,408	**48,422**
Low-Income Dwelling Units	6,572	8,041	10,420	3,477	137	6,821	**35,468**
Moderate Income Units	2,583	5,469	2,576	514	1,225	587	**12,954**
Direct annual electricity savings (MWh)	2,214	4,285	4,092	1,168	226	1,757	**13,743**
Direct annual gas savings (MMBtu)	96,509	149,741	140,027	38,799	11,426	51,843	**488,344**
Direct annual other fuel savings (MMBtu)	52,785	74,236	74,532	21,854	4,695	34,622	**262,725**

**Metrics represent the CEF-funded component of the LMI Single-Family Residential Programs*

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LMI 1-4 Family Residential

LMI EE/BE Portfolio	2026	2027	2028	2029	2030	2031	Total
Incentive Spend ($M)	$58.6	$77.2	$77.2	$77.2	$77.2	$18.6	$386.2
Total Program Expenditures ($M)	$67.5	$89.1	$89.1	$89.1	$89.1	$21.6	$445.5
Participants	6,904	9,205	9,205	9,205	9,205	2,301	46,023
Low-Income Dwelling Units	5,785	7,713	7,713	7,713	7,713	1,928	38,567
Moderate Income Units	1,118	1,491	1,491	1,491	1,491	373	7,456
Direct annual electricity savings (MWh)	510	680	680	680	680	170	3,399
Direct annual gas savings (MMBtu)	63,120	84,159	84,159	84,159	84,159	21,040	420,799
Direct annual other fuel savings (MMBtu)	69,498	92,663	92,663	92,663	92,663	23,166	463,316

In addition to the EE/BE funds shown above, NYSERDA anticipates spending approximately $110 million per year for EmPower+ incentives funded by RGGI, IRA HEAR, and the Sustainable Futures Program, depending on the availability of these sources.

LMI 1-4 Family Residential

Challenges	Opportunities
Complicated program design	• Simplify the enrollment process through streamlined application and project approval systems • Implement standardized simulation for calculating energy savings • Build on positive relationships with stakeholder networks including the Building Performance Contractor Association, leveraging experience to enhance program design
Limited opportunities for Renters	• New offer for occupants of rental units will leverage virtual energy assessments, combined with energy education • Options for low or no-cost online purchases of energy efficient products from a curated catalogue of products renters can use without altering the building
Electrifying space heating to scale	• LMI Order allows up to 15% of program funding to support the adoption of heat pumps • Focusing on energy affordability by targeting heat pump installations in homes using delivered fuels and electric resistance heating
Disproportatate program particiaption	• Introduce a system for application review that aligns with the marketing and outreach strategy that will prioritize applications based on utility referrals, participation in an EAP program, geographic DAC, and location in traditionally under-served regions

Pause for Discussion

Clarity?

Context?

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Affordable Multifamily

Affordable Multifamily

Pre-2020

2016 – Multifamily Performance Program updated with CEF funds

2019 - FlexTech opens to Multifamily

2021

Direct Injection partnerships with HCR and HPD officially launches to provide EE incentives to housing preservation projects

AMEEP Launch

2022

Multifamily Performance Program closed to new applications

2023

AMEEP “Enhanced Incentives”

2024/2025

LMI Technical Assistance expanded to offer on-site energy manager, owners rep, and targeted audits for small buildings

AMEEP updated non-comprehensive rates

AMEEP implements budget management measure

2026

Launch of AMP Up

Renewal of Direct Injection Affordable Housing Partnerships

Renewal of LMI technical assistance offering

AMEEP “re-launch”

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Affordable Multifamily Energy Efficiency Program (AMEEP)

2020-2025	Central Hudson	Con Edison	KEDLI/KEDNY /NMPC	NFG	NYSEG/RGE	O&R	Total
Incentive Spend ($)	$36,103	$192,098,328	$17,176,129	$857,596	$5,051,297	$126,022	**$215,345,475**
Total Program Expenditures ($)	$42,352	$218,929,257	$22,764,347	$1,104,342	$5,682,924	$156,396	**$248,679,618**
Direct annual electricity savings (MWh)	4	37,310	6,001	-	5,128	6	**48,449**
Direct annual gas savings (MMBtu)	470	1,783,605	242,759	14,898	36,785	2,172	**2,080,689**

Source: Statewide LMI Annual Report, Appendix A. Totals may vary slightly from other slides due to rounding.

Affordable Multifamily – National Grid

KEDLI	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($)				$ 79,040	$ 496,011	$ 64,220	$ 639,271
Total Program Expenditures ($)				$ 79,040	$ 653,882	$ 91,635	$ 824,557
Participants (Dwelling Units)				450	935	665	2,050
Direct annual gas savings (MMBtu)				623	1,888	909	3,420

KEDNY	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($)			$340,886	$2,771,117	$ 5,954,146	$4,824,455	$13,890,605
Total Program Expenditures ($)			$340,886	$2,917,523	$ 7,595,044	$6,298,947	$17,152,400
Participants			1,160	13,777	22,110	35,856	72,903
Direct annual gas savings (MMBtu)			3,359	29,914	59,254	118,316	210,844

NMPC	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($)				$491,996	$1,110,625	$ 1,043,632	$2,646,253
Total Program Expenditures ($)				$747,310	$2,418,027	$ 1,622,053	$4,787,390
Participants				6,024	14,359	14,271	34,654
Direct annual electricity savings (MWh)				1,528	2,014	2,458	6,001
Direct annual gas savings (MMBtu)				2,828	17,588	8,080	28,495

Affordable Multifamily-KEDLI and KEDNY

KEDLI	Average MMBtu Savings per Project	Average cost per Project	Average Incentive per Project	Average % Project Cost Covered
Comprehensive	225	$413,475	$223,500	54%
Non-Comprehensive	169	$43,043	$18,977	44%

KEDNY	Average MMBtu Savings per Project	Average cost per Project	Average Incentive per Project	Average % Project Cost Covered
Comprehensive	1,488	$318,040	$174,276	55%
Non-Comprehensive	125	$29,612	$9,615	32%

2020-2025 Completed Projects:

- *Comprehensive - 18*
- *Non-Comprehensive- 1,219*
- *NENY target savings: achieved **22%** of KEDLI planned savings and **94%** of KEDNY planned savings*

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Affordable Multifamily – CECONY

	2020	2021	2022	2023	2024	2025	Total
Incentive Spend (Million $)	$6.2M	$11.5M	$21.6M	$33.9M	$77.6M	$ 39M	$ 189.9M
Total Program Expenditures (Million $)	$8.2M	$16.4	$26.4M	$38.2M	$87.5M	$46.9M	$223.6M
Participants	598	3,075	75,028	85,452	152,141	129,649	436,132
Direct annual electricity savings (MWh)	3,946	3,847	3,089	5,177	8,563	15,505	40,127
Direct annual gas savings (MMBtu)	62,350	180,130	310,153	313,388	435,622	459,923	1,761,565

Affordable Multifamily-CECONY

CECONY (Gas)	Average MMBtu Savings per Project	Average cost per Project	Average Incentive per Project	Average % Project Cost Covered
Comprehensive	1,009	$246,035	$103,804	42%
Non-Comprehensive	368	$74,218	$34,268	46%

CECONY (Electric)	Average MWh Savings per Project	Average cost per Project	Average Incentive per Project	Average % Project Cost Covered
Comprehensive	18	$123,618	$22,670	18%
Non-Comprehensive	20	$41,903	$12,161	29%

2020-2025 Completed Projects:

- *Comprehensive - 87*
- *Non-Comprehensive- 6K*
- *NENY target savings: **27%** above electric target savings, **28%** above gas target savings*

Affordable Multifamily (AMEEP)

Trends and Achievements:

- *Both CECONY and National Grid progressively increased the share of total program savings from comprehensive, whole building measures*
  - *In CECONY's case, this was supported by the strategic phase out of lighting and retail offerings by the end of 2025*
- *Both CECONY and National Grid expanded weatherization, and CECONY introduced electrification, as core components of the 2026-2030 EE/BE portfolio "re-launch"*
  - *Weatherization includes high-impact building envelope measures like as attic/roof and wall insulation*

Evaluations:

- *The statewide Process analysis covering program years 2022-2023 was completed in June 2025*
  - *CECONY completed its Impact analysis in March 2025*
  - *National Grid's Impact analysis will be completed in Q2 2026*
- *The evaluations verified gross savings for CECONY, and assessed program coordination and technical assistance efforts, participation barriers, and stakeholder experience*
  - *Confirmed achievement of verifiable energy savings for both program pathways for CECONY*
  - *Identified opportunities to improve approval timelines, communication among program delivery providers, and streamline program processes*

Affordable Multifamily (AMEEP)

- ***Barriers***
  - *Program complexity*
  - *Even with incentive support, project costs deter participation*
    - *Especially in UNY where property owners were smaller and independent*
- ***Challenges***
  - *Lengthy project timelines, both internal and external*
  - *While improvements have been made, administrative requirements for participating contractors can be prohibitive*
- ***Opportunities***
  - *Continue to streamline program offering*
    - *Comprehensive Pathway still presents opportunity for simplification (e.g., revisiting points system)*
  - *Improved collaboration with external agencies such as HCR/HPD/NYGB*
  - *Improve communication throughout project timeline*

Affordable Multifamily-CECONY

	2026	2027	2028	2029	2030	Total
Incentive Spend (Million $)	$54.3M	$61.1M	$ 72.2M	$82.9M	$96.2M	$366.6M
Total Program Expenditures (Million $)	$71.5M	$77.6M	$89.9M	$101.9M	$116.6M	$457.5M
Participants (Dwelling Units)	159,510	161,694	166,062	171,210	178,152	836,628
Direct annual electricity savings (MWh)	12,386	14,252	17,531	20,558	24,420	89,147
Direct annual gas savings (MMBtu)	353,293	358,750	369,707	382,768	398,269	353,293

Affordable Multifamily – National Grid

KEDLI	2026	2027	2028	2029	2030	Total
Incentive Spend ($)	$2.5 M	$2.8 M	$3.1 M	$3.4 M	$3.7 M	$15.5 M
Total Program Expenditures ($)	$3.1 M	$3.5 M	$3.9 M	$4.2 M	$4.6 M	$19.4 M
Participants (Dwelling Units)	3,460	3,890	4,320	4,750	5,190	21,610
Direct annual electricity savings (MWh)	-	-	-	-	-	-
Direct annual gas savings (MMBtu)	12,472	14,031	15,590	17,149	18,708	77,949

KEDNY	2026	2027	2028	2029	2030	Total
Incentive Spend ($)	$11.7 M	$13.2 M	$14.7 M	$16.1 M	$17.6 M	$73.4 M
Total Program Expenditures ($)	$14.8 M	$16.6 M	$18.3 M	$20.1 M	$21.9 M	$91.7 M
Participants (Dwelling Units)	15,320	17,230	19,150	21,060	22,980	95,740
Direct annual electricity savings (MWh)	-	-	-	-	-	-
Direct annual gas savings (MMBtu)	55,231	62,135	69,039	75,943	82,847	345,194

NYSERDA Existing Affordable Multifamily

CEF Portfolio

2020-2025 Affordable Multifamily Sub-portfolio key program pillars:

- *Direct Injection*
- *LMI Technical Assistance*
- *Multifamily Performance Program (MPP)*

Overview

- *Earlier years (2020-2022), incentive spend was largely driven by MPP*
- *Since 2023, Direct Injection drives incentive spend*
- *LMI Technical Assistance has shown consistently strong intake and spend has increased in latter years aligning with new offerings and Local Law 97*

NYSERDA Affordable Multifamily

CEF and EE/BE Budget & Benefits

Affordable Multifamily Metrics	CEF LMI 2020-2025	EE/BE LMI 2026-2032
Incentive Spend ($M)	$91.1	$287.2
Total Program Expenditures ($M)	$109.6	$316.2
Participants – Dwelling Units	41,314	254,668
Participants – Buildings	n/a	6,151
Direct annual electricity savings (MWh)	35,686	46,856
Direct annual gas savings (MMBtu)	584,314	1,855,266
Direct annual other fuel savings (MMBtu)	126,511	484,725
> Program Expenditure / Participant (Unit)	$2,653	$1,241
> Total Energy Savings MMBtu-e / Participant (Unit)	20.2	9.8

Additional funding leveraged for Affordable Multifamily EE/BE includes the following RGGI funds:

- ~$16M for AMP Up to support resiliency measures and non-SBC paying customers
- ~$10M for New Construction support

Affordable Multifamily – EE/BE Program Budgets

NYSERDA 2026-2030 EE/BE Budget for Affordable Multifamily				
Program	**Budget $ (M)**	**Incentive $ (M)**	**Participant (Dwelling Units)**	**Participant (Buildings)**
Affordable Multifamily Program Upstate (Upstate only)	$116.4	$102.25	23,949	1,841
Direct Injection (Statewide)	$133.6	$133.6	8,669	174
LMI Technical Assistance (Statewide)	$50.2	$46.36	210,049	4,056
Affordable New Construction (Statewide)	$16	$14.5	12,000	80
Total	**$316.2**	**$287.21**	**254,668**	**6,151**

Programs differ in level of intervention and spend per project.

NYSERDA Affordable Multifamily

Opportunities and Challenges

Direct Injection – Affordable Housing Partnerships

Opportunities

- *Scaling up approach to expand to solar*

Challenges

- *Ensuring optimal building operation through effective system design, installation, and commissioning*

Barriers

- *Comprehensive measures cost*
- *Project timelines*
- *Macro-economic conditions (e.g. interest rates)*

Technical Assistance

Opportunities

- *Collaborate with downstate utilities to streamline customer experience from TA to implementation*
- *Integrate TA into AMP Up*

Challenges

- *Aligning Flex Tech requirements with AMEEP while allowing flexibility to meet TA needs of specific projects*

Barriers

- *Aligning timelines and streamlining coordination across different program administrators*

AMP Up

Opportunities

- *Launching new program that can serve as a one-stop shop (concierge service and embedded TA)*
- *Pair end use incentives with resilience enhancements*

Challenges

- *Limited number of contractors serving upstate*
- *Small multifamily buildings needing additional support throughout project*

Barriers

- *Pre-weatherization remediation*

Pause for Discussion

Clarity?

Context?

Concerns?

Raise your hand, use the Q&A or email us at equity@dps.ny.gov

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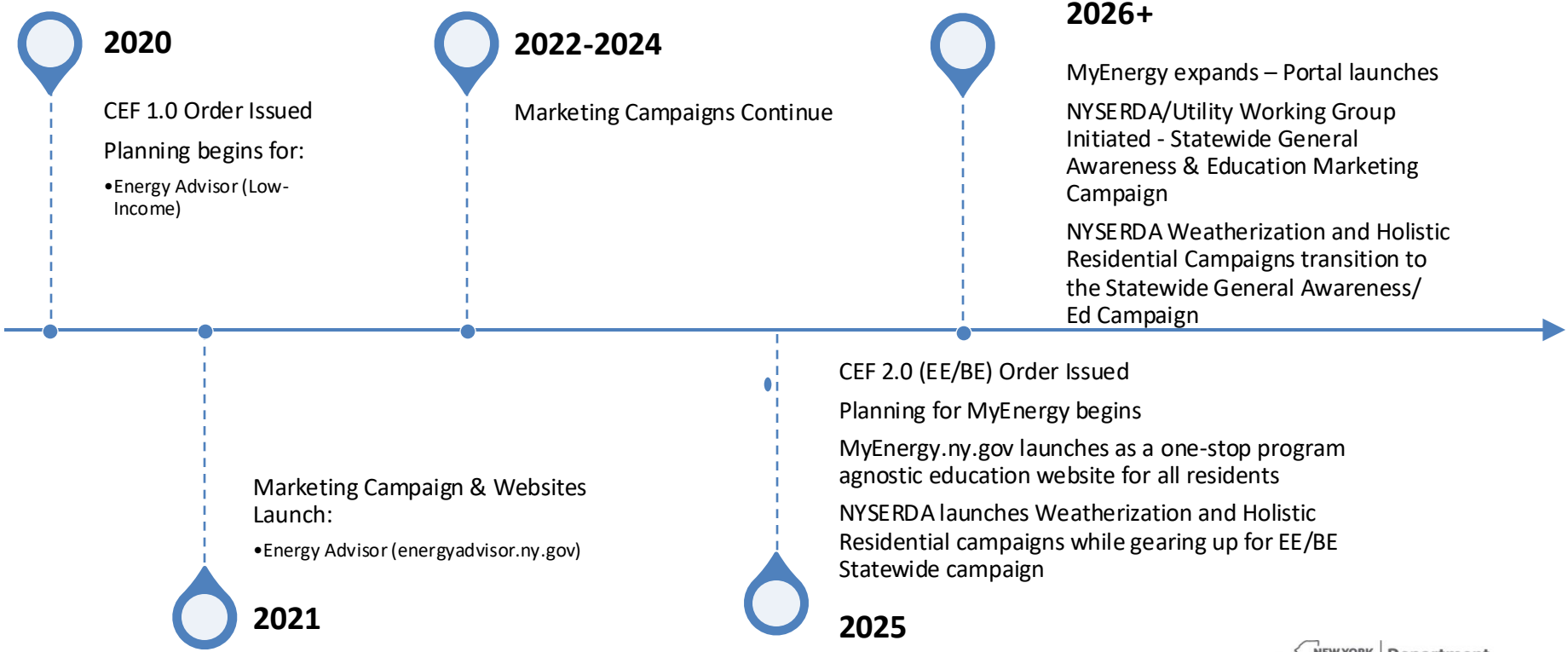
General Awareness & Education

General Awareness & Education: Marketing



General Awareness & Education: Marketing

Past Performance

Spend	2020	2021	2022	2023	2024	2025	Total
Energy Advisor Marketing Spend ($M)	$0.1	$0.8	$1.0	$0.6	$1.1	$1.3	$5.0
Results	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**Total**
Energy Advisor Quiz Completions	N/A	N/A	39,707	43,593	90,590	80,506	254,396
"Apply Now" clicks to EmPower+	N/A	N/A	2,610	3,221	4,261	971	11,063

2026-2030 Budget

	2026	2027	2028	2029	2030	Total
Marketing Spend ($)	$2.0M	$1.6M	$1.6M	$1.5M	$1.5M	$8.3M

General Awareness & Education: Marketing

NY Energy Advisor

- Saw nearly 1.7 million users since it's launch with an over 87% completion rate for the quiz that produces solutions.
- Utilized mobile phone language settings to auto-translate ads (and website), creating a better user experience for non-English speakers.
  - This yielded a 36% increase in engagement in 2025 alone, indicating the need to deliver information in native languages.
- Used a DAC-targeting tool to ensure messaging for the benefits of the website were equitable across the State.
- Insights learned from launch of NY Energy Advisor through today, not only taught us about how the income-eligible segment responds to messaging, but learnings helped to inform content for MyEnergy.ny.gov
  - Insights gained the NY Energy Advisor project allowed us to increase conversion through data showcasing key performance indicators via on-site actions (what people are more likely to click on)

General Awareness & Education: Marketing

Known Barriers[1]

What are the biggest energy related challenges you face in your home?

	Low-Income	Moderate-Income
Monthly utility costs	60%	58%
Drafts/air leaks	33%	30%
Uncomfortable Temperatures	27%	21%
Inconsistent Temperatures	28%	27%
Poor indoor air quality	24%	22%
Concern over safety	19%	23%
Equipment maintenance	25%	32%
Uncertainty over fuel costs	27%	33%

[1] 2025 NYSERDA Survey – 2,920 residential participants

Opportunities for Go-Forward Marketing

Home energy assessments lead to recommendations that can lower monthly costs, reduce fossil fuel consumption, and improve indoor air quality and comfort. **But most households** (73% low-income, 65% moderate-income) **have never had an assessment.**

Marketing messages will lean into the benefit that a clean energy home can be a home that saves on monthly bills.

General Awareness & Education: DAC and Community-Based Engagement

2020

Hubs: Community Stakeholder Engagement Sessions conducted

Hubs: Community Engagement Co-Design Process began

2021

Hubs: Developed Online Clearinghouse for organizations to express interest

Hubs: Regional Clean Energy Hubs solicitation issued

Pool: Research and planning for the DAC Consultant Pool

2022

Hubs: Regional Clean Energy Hub program launched

EEC: Research and co-design for the Energy Equity Collaborative

Pool: Request for Information and inaugural DAC Consultant Pool solicitation issued

2023

Hubs: Hub Baseline Evaluation conducted

Hubs: Inaugural Annual Hub Meeting convened

EEC: Inaugural meeting of the Energy Equity Collaborative Steering Committee, ongoing

2024

Hubs: Regional Assessment and Barriers Analyses submitted

Hubs: Phase 2 Evaluation conducted

EEC: Inaugural meetings of the four sector-focused working groups, ongoing

2025

Hubs: Outreach and Equitable Engagement Plan developed

Hubs: Facilitated EE-BE Program planning and metrics development

Pool: DAC Consultant Pool solicitation reissued as application-based open enrollment solicitation

NOTE:
Hubs – Regional Clean Energy Hubs
EEC – Energy Equity Collaborative
Pool – Disadvantaged Communiteis (DAC) Consultant Pool

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General Awareness & Education: DAC and Community-Based Engagement

	2020	2021	2022	2023	2024	2025	Total
Tools, Training, & Replication Spend ($)	$ 0.0	$ 0.1	$ 1.6	$ 3.7	$ 5.7	$ 9.7	**$ 20.9**
Total Program Expenditures[1] ($)	$ 0.2	$ 0.8	$ 2.7	$ 4.5	$ 7.5	$ 11.9	**$ 27.6**
Participants[2]	1,140	424	99	2,251	6,745	10,592	**21,251**

1. Represents CEF funding. Additional funding for Hubs is provided by RGGI and other sources.
2. Includes referrals through Community Energy Engagement Program (2020-2021) and referrals from Regional Clean Energy Hubs to various state and utility programs (2022-2025).

General Awareness & Education: DAC and Community-Based Engagement

Achievements

Regional Clean Energy Hubs

- *8,505 outreach events*
  - *2,456 in DACs*
  - *226,234 people engaged*
  - *6,000 community solar subscriptions within 1 week in Central NY Region*
- *Baseline Evaluation (2023) and Phase 1 Evaluation (2024)*
  - *1,100 Partnerships*
  - *533% increase in outreach events*

Energy Equity Collaborative

- *Advised NYSERDA on EE/BE Implementation Plan development*
- *~88 program engagements supported (2023-2025)*
- *EEC Participation Plan approved by Steering Committee*
- *Four Working Groups have Action Plans developed for Engagement and Access, Housing and Buildings Efficiency and Electrification, Workforce Development and Economic Opportunity, and Energy Transition.*

DAC Consultant Pool

- *28 DAC-representing organizations participate in the Pool through Umbrella Agreements, with additional Agreements in-progress*
- *19 organizations participating in the Energy Equity Collaborative*
- *4 organizations participating in the NYS Adaptation and Resilience Plan Equity Panel*
- *11 organizations participated as 2025 NYS Energy Plan Advisors on Disadvantaged Communities*

General Awareness & Education: DAC and Community-Based Engagement

Challenges/Barriers and Opportunities

Regional Clean Energy Hubs

Challenges/Barriers

- *Mid-cycle Program Changes*
- *Customer social service needs*
- *Securing wrap around services for residents*

Opportunities

- *Leverage NYSERDA's reputation as a trusted program administrator*
- *Onboarding translation contractor (in progress) will increase reach in underserved communities*

Energy Equity Collaborative

Challenges/Barriers

- *Aligning with steering committee members on participation expectations*
- *Engagement timing on program design*
- *Action planning resource constraints*

Opportunities

- *Onboarding additional participants*
- *Action Plans and technical assistance to support equitable program planning + resource development*
- *Increase opportunities for broader awareness and engagement*

DAC Consultant Pool

Challenges/Barriers

- *Resource constraints (e.g., staff time, compensation funding)*
- *Prioritizing and tailoring programs to benefit DACs*

Opportunities

- *Increasing number of engagement opportunities in the pipeline*
- *Process evaluation, including participant survey, will assist with identifying areas for improvement*
- *Tailored outreach to DACs*

General Awareness & Education: DAC and Community-Based Engagement

EE/BE Portfolio	2026	2027	2028	2029	2030	2031	2032	Total
Incentive Spend ($M)	$2.4	$10.3	$10.8	$13.0	$13.4	$4.3	$0.2	**$54.4**
Total Program Expenditures[1] ($M)	$5.1	$12.3	$12.8	$14.8	$15.1	$5.3	$0.2	**$65.6**
RGGI Leveraged ($M)	$2.0	$8.2	$8.7	$9.1	$7.0	$0.6	-	**$35.6**
Participants[2]	12,000	13,200	14,652	16,117	17,728	-	-	**73,697**

1. EE/BE DAC Engagement is funded from both LMI and Non-LMI portfolios. LMI funding represents 67% ($44M) of the total ~$66M in program funding.
2. Referrals from Regional Clean Energy Hubs are made to various state and utility programs.

Pause for Questions

Clarity?

Context?

Concerns?

Raise your hand, use the Q&A or email us at equity@dps.ny.gov

Workforce Development

Workforce Development

2018 - 2025

NYSERDA's Workforce Development and Training Program trained approximately 38,000 new and existing workers.

January 2026

Updated On-the-Job Training Program for enhancements associated with Workforce Development Implementation Plan.

March 2026

Launched two new programs:

-Clean Energy Career Pathways Training

-Technical Skills Training & Upskilling Program

September 2026

Work underway on assessment of workforce training and employment needs and opportunities across NY's EE/BE ecosystem.

Workforce Development[1]

	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($)	$6.3	$9.9	$9.8	$9.3	$13.1	$15.3	$63.7
Total Program Expenditures ($)[2]	$7.2	$11.5	$12.1	$11.5	$15.4	$16.8	$74.5
Participants (Trainees)	2,892	10,758	9,904	4,582	4,833	4,728	37,697
Existing Workers Trained[3]	2,392	9,947	9,263	3,127	3,677	3,184	34,681
New Workers Trained				1,245	812	1,034	
Interns, Fellows, and New Hires Trained through On-the-Job Training	500	811	641	210	344	510	3,016

[1] Workforce Development program funding up through 2025 was not split between LMI and Non-LMI sectors.
[2] RGGI Expenditures on Workforce Development and Training Initiatives from 2020 – 2025 totaled $13.1M.
[3] Separate reporting for existing worker and new worker trainees started in 2023.

A program impact evaluation is underway and will be completed later this year.

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Workforce Development

Top Priority Barriers, challenges, and opportunities:

- **Refined Program Offerings:** Administering separate programs for new workers and upskilling existing workers will improve tracking and reporting of trainee type and job placement outcomes for new workers.
- **On-the-Job Training Program Enhancements:** Funding to support businesses hiring and training new workers includes a focus on job retention and new incentives for industry certifications.
- **DAC investment:** Each funding opportunity includes provisions to direct funding to workforce development initiatives that benefit disadvantaged communities.
- **Program Coordination:** NYSERDA Workforce team is working closely with utility program administrators and other NYSERDA teams to connect investments in workforce development activities with business demand and market need related to EE/BE program deployment.
- **Partnerships:** NYSERDA is collaborating with other agencies (Department of Labor, New York Power Authority, Empire State Development) providing funding for clean energy workforce training.
- **EE/BE Workforce Assessment**: Assessment is underway that will inform program administration and improve access to information about the EE/BE training ecosystem.

Workforce Development

EE/BE Portfolio	2026	2027	2028	2029	2030	2031	2032	Total
Incentive Spend ($M)	$4.2	$8.8	$11.8	$16.7	$15.7	$10.4	$5.9	**$73.5**
Total Program Expenditures[1] ($M)	$5.5	$10.2	$13.6	$18.5	$17.2	$11.6	$6.3	**$83.0**
New Workers Trained	200	900	1,420	1,440	1,440	1,100	500	**7,000**
New Workers Placed	200	575	840	1,140	1,210	870	665	**5,500**
Existing Workers Trained	858	2,145	3,289	3,289	2,860	1,430	429	**14,300**

1. EE/BE Workforce Development is funded from both LMI and Non-LMI portfolios, with unified market goals for training and job placements. LMI funding represents 36% of the total $83M in program funding ($30M)

Pause for Discussion

Clarity?

Context?

Concerns?

Raise your hand, use the Q&A or email us at equity@dps.ny.gov

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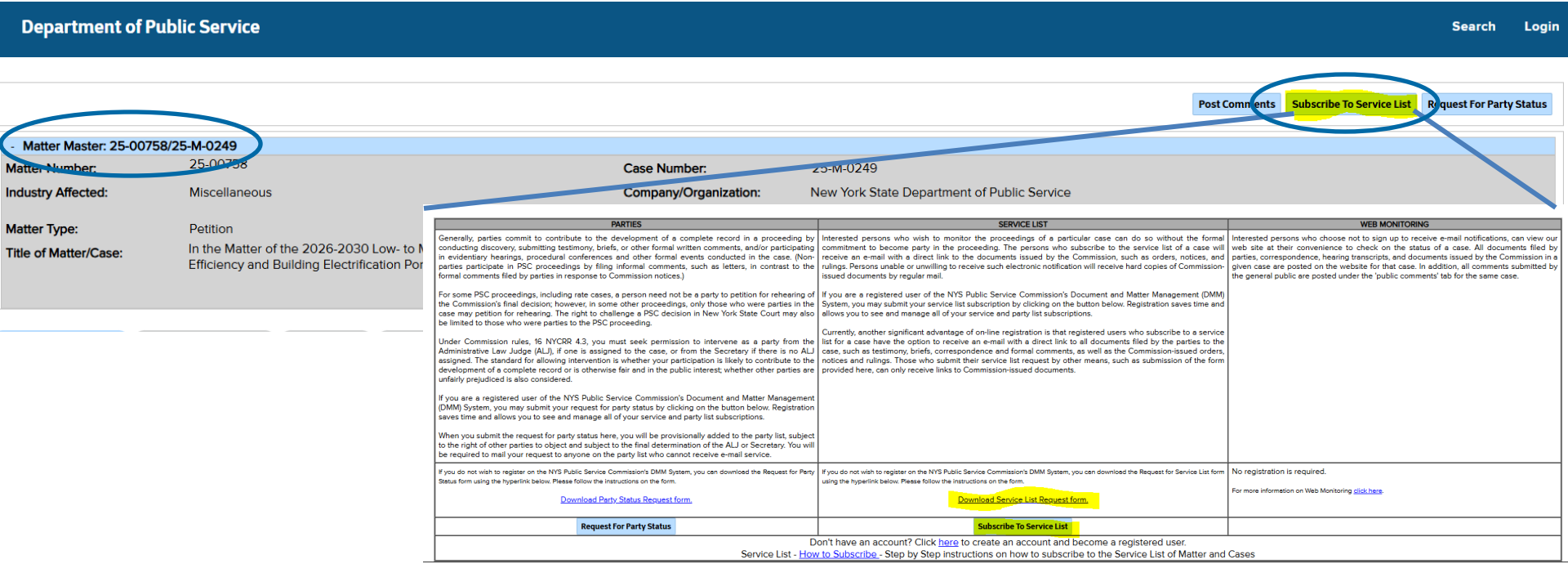
Upcoming Forums and Opportunities to Engage

Feedback for Continuous Improvement

You can help improve these forums by taking a short, 2-minute survey: https://tinyurl.com/4zrbu7bf

Tentative Schedule			
Quarter	**Date**	**Time**	**Location**
Q1 2026 Forum	May 6, 2026	10:00am - 12:30pm	Virtual
Q2 2026 Forum	July 29, 2026	10:00am - 3:00pm	Albany
Q3 2026 Forum	October 28, 2026	10:00am - 3:00pm	NYC
Q4 2026 Forum	January 27, 2027	10:00 am - 12:30pm	Virtual

Subscribe to DMM Filings



For more information, visit:

https://documents.dps.ny.gov/public/common/search.html

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

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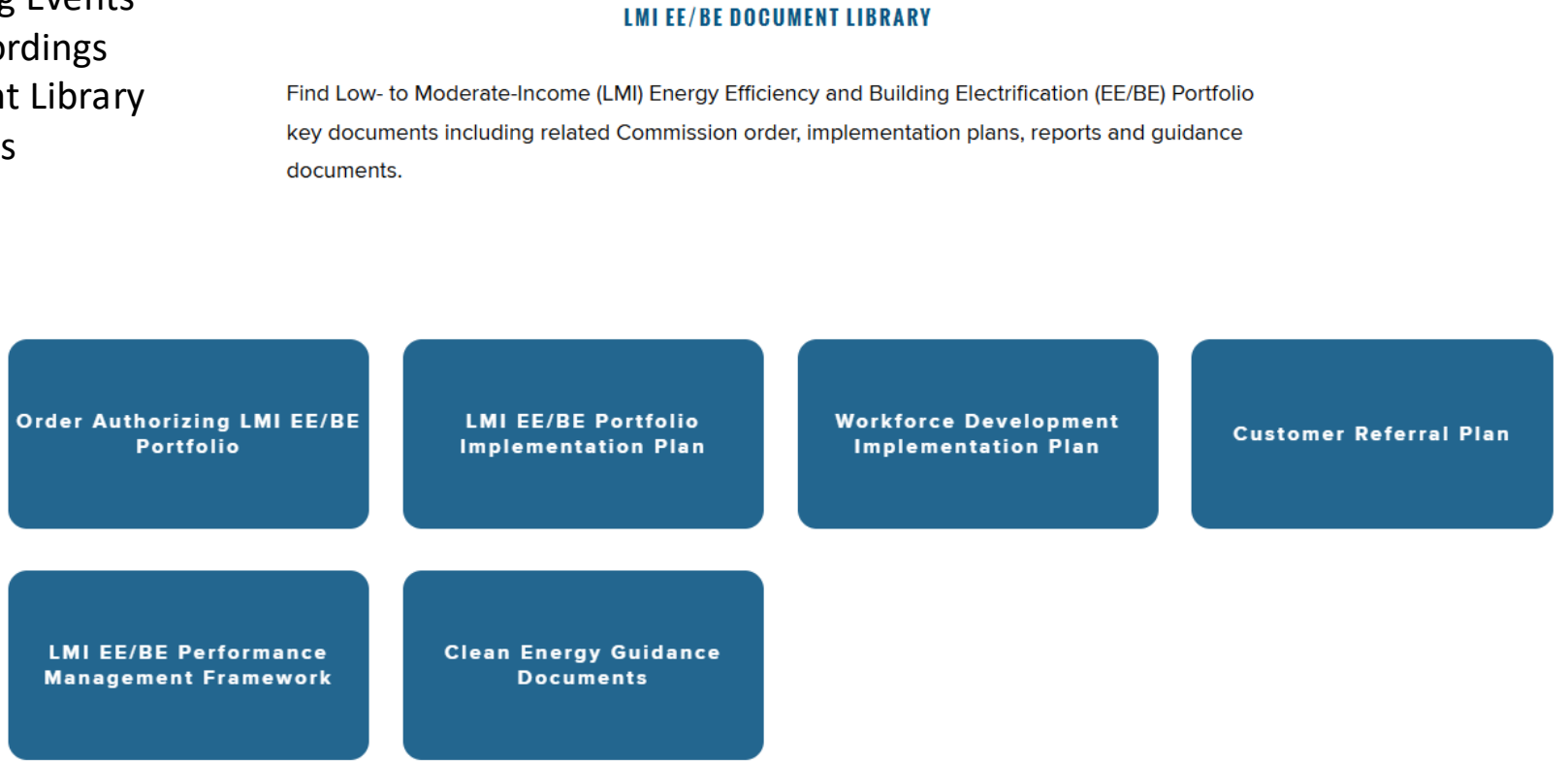
https://dps.ny.gov/lmi-eebe

- Upcoming Events
- Past Recordings
- Document Library
- Resources



And more within the Office of Markets & Innovation:

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

Department of Public Service

Thank you for participating!

equity@dps.ny.gov

Appendix

Acronyms in Today's Presentation

- **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 *(+$53 in Non-LMI)*	$-	$-	$-	$30 *(+$53 in Non-LMI)*
Administration	$120	$47.9	$2.8	$2.1	$172.8
EM&V	$24	$7.9	$2.7	$.5	$ 35.1
NYS Cost Recovery Fee	$12	$-	$-	$-	$12
Total	**$1,000**	**$457.5**	**$91.7**	**$19.4**	**$1,569**

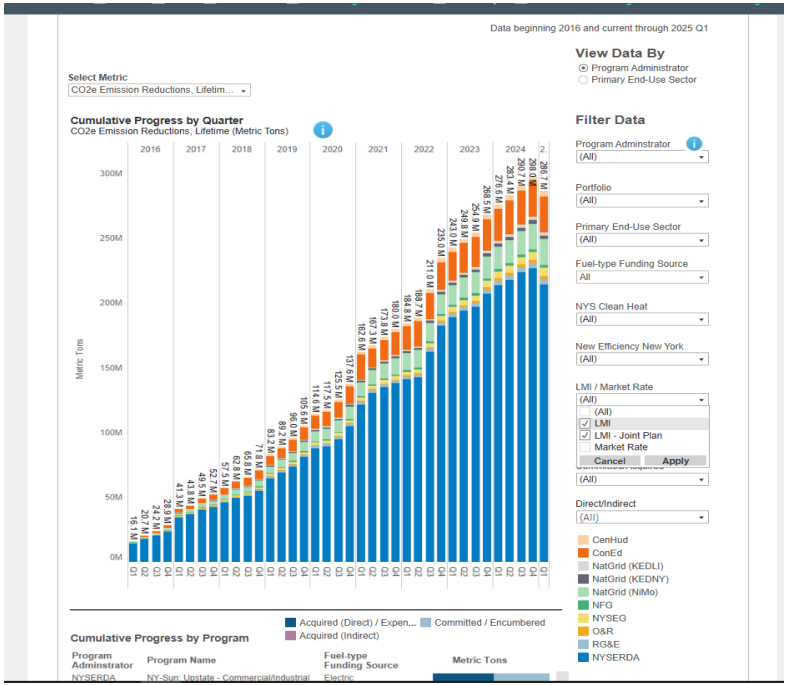
**The May 2025 Order provides a total budget for utilities, budget breakdowns are as proposed. Numbers may not sum due to rounding*

Open-NY Clean Energy Dashboard

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



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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:

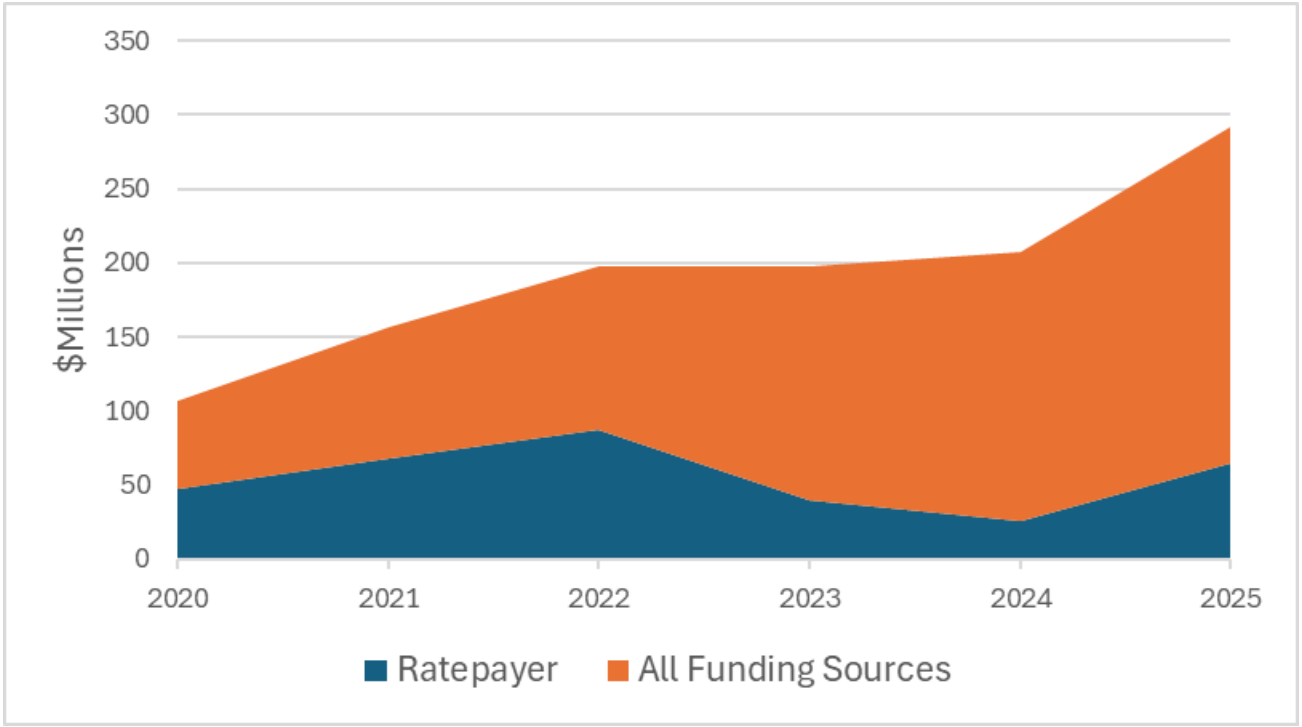
25-M-0248	25-M-0249
In the Matter of the 2026-2030 Non-Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolios	In the Matter of the 2026-2030 Low- to Moderate-Income Energy Efficiency and Building Electrification Portfolio

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

LMI 1-4 Family Expenditures



Single-Family Residential Evaluation Summary

- Heat Pump Electrification Insights Impact (2021-2022)

  Completed Q3 2024

  - Key Findings
    - LMI customers motivated to install heat pumps to **save money, improve home comfort and replace systems before burnout**
      - **Many delivered fuel customers are meeting their heating and cooling loads** with their new heat pumps
    - **Heat pumps and heat pump water heaters significantly displaced delivered fuels and lowered utility bills for LMI customers**
      - Energy bill savings for delivered fuels were estimated to be **~$1,000 per year**
    - **Current incentive offerings are not always sufficient** to meet heat pump installation requirements due to high equipment and installation costs.
      - Eligibility requirements and incentive levels will continue to be reassessed to best serve households, particularly LMI

https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/2024-Market-Characterization-and-Assessment-Report.pdf

Single-Family Residential Evaluation Summary

- EmPower+ Impact Evaluation (2023)

  Completed Q3 2025

  - Key Findings* *Evaluation focused on electric and natural gas*
    - Evaluated energy savings were found to be lower than program projections due to a change in energy savings calculations and assumptions methods (EmPCalc to NY TRM)
    - High participant satisfaction and other non-energy benefits reported
      - 70% of participants report winter comfort improvements
      - Nearly 50% report summer comfort improvements
      - Reports of health and safety improvements among participants
    - Delivered fuels evaluation underway

https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSERDA-SingleFamily-LMI-Retrofit-Programs-Evaluation-ReportNovember-2025.pdf

NYSERDA Affordable Multifamily Existing Buildings

Recap on 2020-2025: CEF Budget and Benefits

Affordable Multifamily Metrics	2020	2021	2022	2023	2024	2025	Total
Incentive Spend ($M)	$ 7.0	$ 5.5	$ 6.7	$ 11.6	$ 24.9	$ 35.5	**$ 91.1**
Total Program Expenditures ($M)	$ 9.4	$ 8.0	$ 8.7	$ 13.9	$ 30.2	$ 39.4	**$ 109.6**
Participants	2,665	6,731	3,047	20,221	2,463	6,187	**41,314**
Direct annual electricity savings (MWh)	2,698	8,281	7,997	5,858	5,036	5,816	**35,686**
Direct annual gas savings (MMBtu)	27,459	36,477	15,911	140,448	121,994	242,026	**584,314**
Direct annual other fuel savings (MMBtu)	279	1,897	35,445	7,138	9,424	72,329	**126,511**

Budget and Benefits covers: Direct Injection, LMI Technical Assistance, Multifamily Performance Program, RetrofitNY

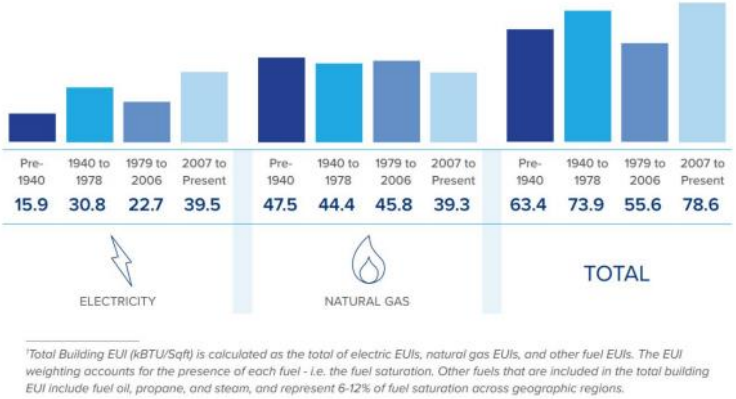
Affordable Multifamily Evaluation Summary

- Statewide Multifamily Building Stock Study completed Q1 2025 and Market Assessment completed Q2 2024
- First MF study of its kind
    - Three components encompassing significant data collection and analysis
        - Stock Study
        - Market Assessment
        - Image analysis
    - Collected data from ~2,400 MF properties, including over 400 onsite visits to collect information on common area and tenant spaces.
- Key findings
    - ~130,000 MF buildings in NYS
    - Energy Use Intensity increases depending on building vintage
        - Pre-1940: 63.4 kBtu/ft2
        - 2007 – present: 78.6 kBtu/ft2
    - Data by climate zone, building vintage, equipment type, etc.
        - Anonymized data will be uploaded to OpenNY imminently

Affordable Multifamily Evaluation Summary

Additional Statewide MF Building Stock Findings

BUILDING SIZE	CLIMATE ZONE 4A	CLIMATE ZONE 4B	CLIMATE ZONE 5	CLIMATE ZONE 6	
1 to 3 Floors	20,246	9,166	27,884	9,395	66,691
4 to 7 Floors	47,381	2,522	2,933	1,042	53,878
8 or More Floors	8,194	446	337	65	9,042



[1]Total Building EUI (kBTU/Sqft) is calculated as the total of electric EUIs, natural gas EUIs, and other fuel EUIs. The EUI weighting accounts for the presence of each fuel - i.e. the fuel saturation. Other fuels that are included in the total building EUI include fuel oil, propane, and steam, and represent 6-12% of fuel saturation across geographic regions.

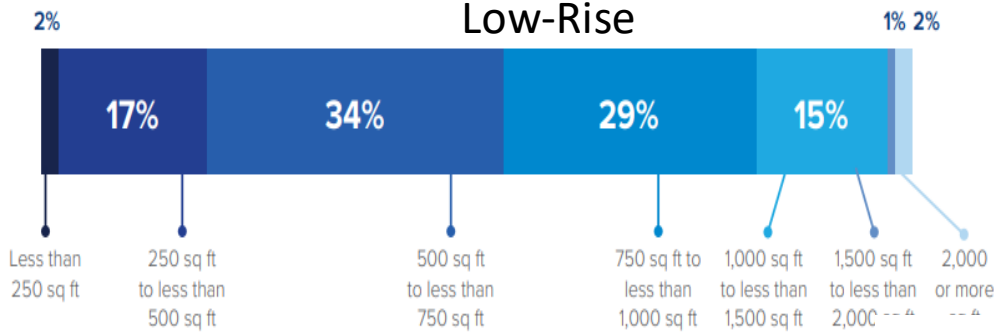
Total MF buildings by size and climate zone

Energy use intensity by fuel and building age (kBTU/Sq ft)

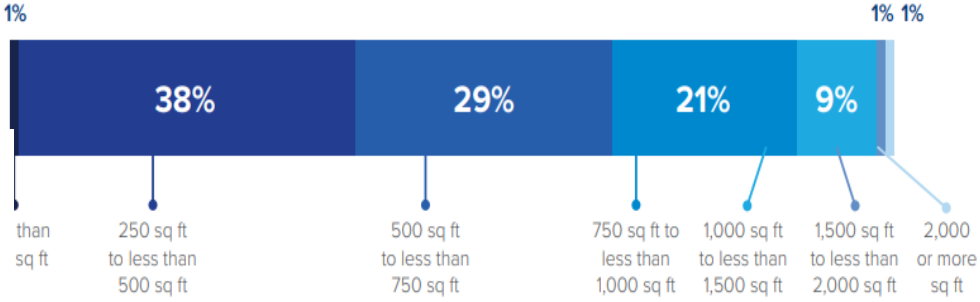
Affordable Multifamily Evaluation Summary

Dwelling units tend to be larger in low-rise buildings than mid- or high-rise buildings

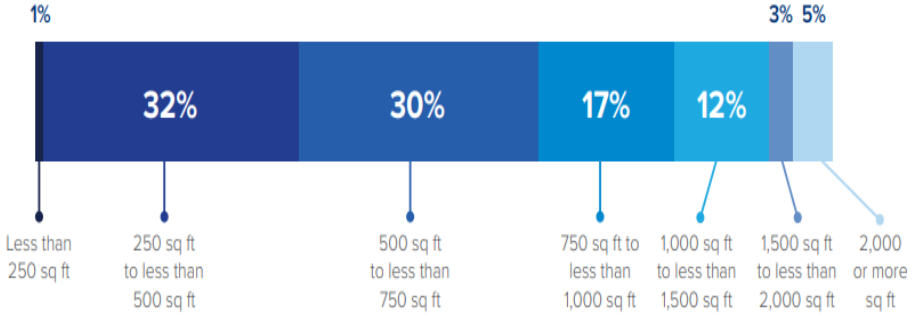
Low-Rise



Mid-Rise



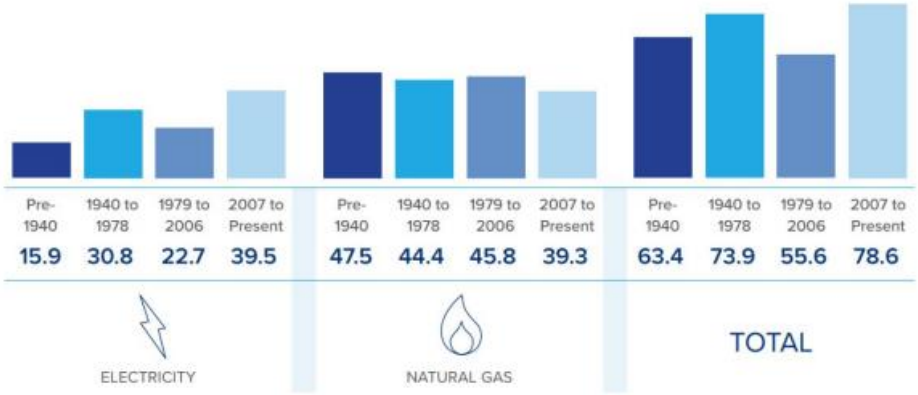
High-Rise



NEW YORK STATE OF OPPORTUNITY. Department of Public Service

Affordable Multifamily Evaluation Summary

Additional Statewide MF Building Stock Findings



[1]Total Building EUI (kBTU/Sqft) is calculated as the total of electric EUIs, natural gas EUIs, and other fuel EUIs. The EUI weighting accounts for the presence of each fuel - i.e. the fuel saturation. Other fuels that are included in the total building EUI include fuel oil, propane, and steam, and represent 6-12% of fuel saturation across geographic regions.

Energy use intensity by fuel and building age (kBTU/Sq ft)

General Awareness & Education: DAC and Community-Based Engagement

Evaluation

Regional Clean Energy Hubs Market Evaluation (Q3 2022 – Q2 2023)

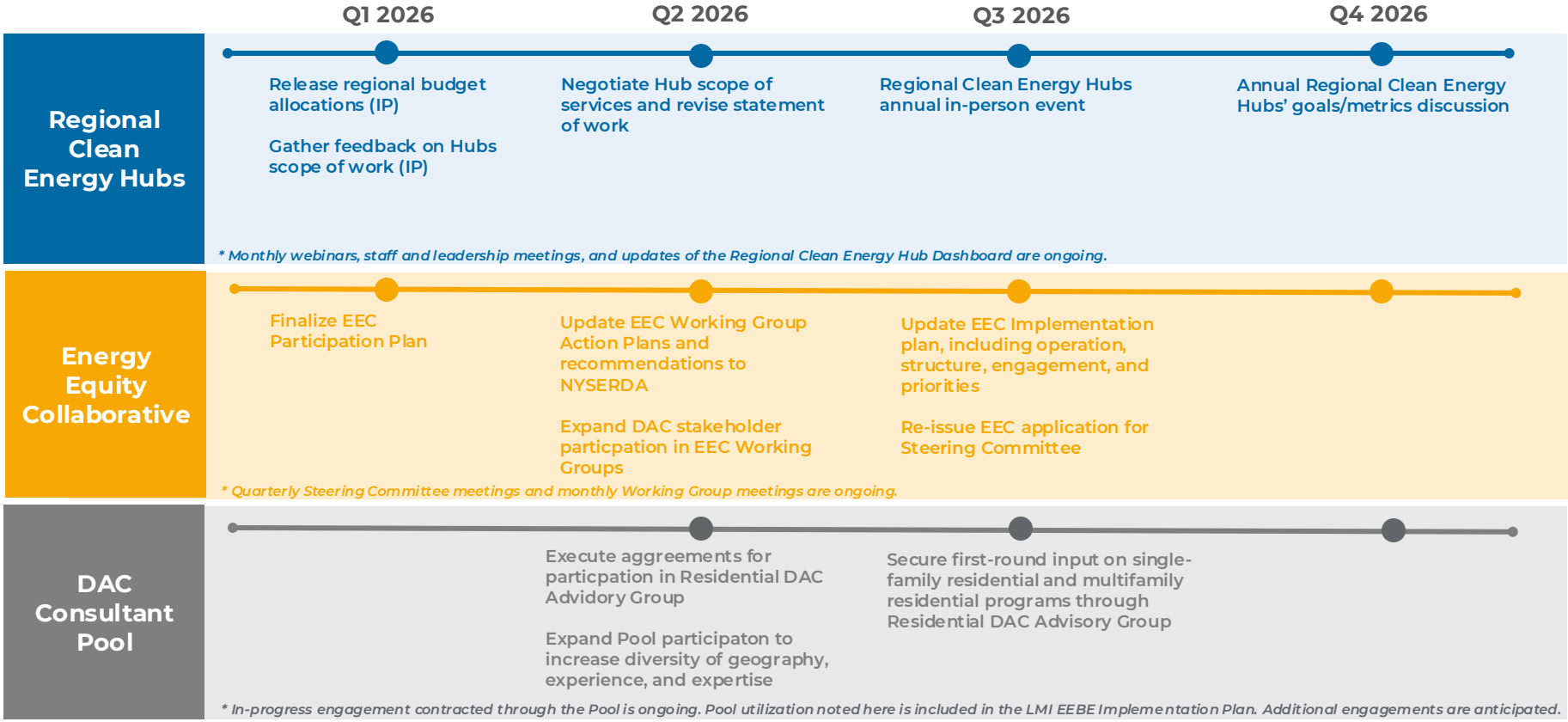
Completed Q3 2024

- **NYSERDA and Hubs are laying a solid foundation for reaching residents and building a culture of collaboration**
  - Demonstrating improved collaboration from prior programs and campaigns
- **Need to enhance timely communications with Hubs as relevant NYSERDA program changes occur**
  - NYSERDA implementing tools to better manage feedback from Hubs and improve two-way communications/engagement
- **Negative perceptions, misinformation and/or limited confidence in specific clean energy services continue to affect equipment installations**, including within DACs
  - Case studies, webinars, community events, and marketing campaigns are in development to improve information sharing about tech

https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSERDARegional-Clean-Energy-Hubsl-ImpactReportSeptember-2024.pdf

General Awareness & Education: DAC and Community-Based Engagement

Near-term Milestones for 2026



LMI Electrification

- LMI EE/BE Order supports early-stage electrification in LMI market segment
- Up to 15% of program budgets available to support electrification
- 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.