Residential Weatherization in Disadvantaged Communities

NYS Dept. of Public Service Technical Conference Summary

June 16, 2026, 10:00am – 3:00pm, Virtual and In-Person in Albany, NY

New York State Department of Public Service (DPS) Staff convened a technical conference to identify barriers to residential weatherization within disadvantaged communities across New York State and discuss strategies to address them through the ratepayer-funded Low- to Moderate-Income (LMI) and Non-LMI Energy Efficiency and Building Electrification (EE/BE) programs administered by the New York State Energy Research and Development Authority (NYSERDA) and the major investor-owned utilities (Utilities). The conference touched on barriers and strategies relevant to both one- to four-family and multifamily programs, including the Non-LMI Upstate and Downstate Regional Residential Weatherization Programs currently being developed by the Utilities.

This summary covers Q&A and discussion not captured in the conference presentation slides. The presentation slides can be found through the DPS Document and Matter Management system (DMM) in case numbers 25-M-0248 and 25-M-0249.

Agenda

Time	Session	Presenter
10:00am – 10:05am	**Welcome & Housekeeping**	• Chris Coll, DPS
10:05am – 10:20am	**NYS Disadvantaged Communities Residential Weatherization Context**	• Chris Coll, DPS
10:20am – 11:15am	**Presentation on Barriers to Residential Weatherization in Disadvantaged Communities**	• Christina Bohnsack, Co-Director, Capital Region Clean Energy Hub • Erin Griffin, Director, North Country Clean Energy Hub • Jenna Lawson, Director, Finger Lakes Clean Energy Hub
11:15am – 12:00pm	**Program Administrator Round Robin: 1-4 Family Programs**	• Program Administrators
12:00pm – 12:30pm	**Program Administrator Round Robin: Multifamily Programs**	• Program Administrators
12:30pm – 1:15pm	***Break***	
1:15pm – 2:00pm	**Presentation from the Field: Oakland EcoBlock Pilot**	• Therese Peffer, Associate Director, California Institute for Energy and Environment, CITRIS Climate initiative

		• Richard Brown, Academic Researcher, California Institute for Energy and Environment, CITRIS Climate initiative
2:00pm – 3:00pm	**Facilitated Discussion**	

NYS Disadvantaged Communities Residential Weatherization Context: Questions & Answers

Source	Question/Comment	Response
Albany	In the EE/BE orders, the Commission broke down the costs for each kind of program in the context of deciding where to allocate money. A lot of advocates pushed for putting more money into disadvantaged communities 1-4 family programs. Ultimately, the Commission seemed to say that that was the most expensive program to administer, making it the least cost-effective.	Chris Coll: A couple of points on the framing you gave. The Commission was contemplating a portfolio-wide set of considerations. There's an expectation that these investments will help bring us closer to the CLCPA objectives of reducing emissions across New York State. The Commission had to consider the balance of investments in small homes as well as in large buildings and for commercial and industrial customers, where there is a lot of opportunity for reducing localized combustion and GHG emissions. The Commission also has an affordability policy targeting low-income and, recently, moderate-income households, so that also has to be considered in the development of the Orders. The reason why it's more expensive to serve small homes, especially LMI homes, is that they require more subsidy. In the EmPower+ program, we're looking at a subsidy of about 100% of costs for low-income homes. Over the last couple of years, an average project has been about $10K [Courtney Moriarta (NYSERDA) clarified: $8-9K]. The emissions reduction potential in small homes doesn't compare to what's achievable in large buildings. That's not to say that the state shouldn't be investing in LMI residential, but it raises the question of how to balance the portfolio to advance multiple policy objectives. The other thing the Commission said in these orders is that these programs are funded by utility ratepayers, so we need to look at how we are able to bring other funding sources into these programs to broaden their reach.

Source	Question/Comment	Response
Albany	Two things: One, in addition to the cost of projects, there is the cost of administration. My understanding is that the reason geolocation was either limited or ditched was because of federal rules. That is probably no longer relevant and it seems to me we should bring that back to the extent possible. The second point, and I know solar and EE/BE are not the same, but one of the strengths of the NY Sun megawatt block was predictability over many years, and one of the things that's driving us all crazy – and by "all" I mean everyone, including [DPS], is constant changes in program rules.	Chris Coll: We can put geo-eligibility in the parking lot to discuss later today. Thanks for raising that. [Note that there was not sufficient time left in the agenda to revisit the question of geo-eligibility]. With respect to predictability with respect to program rules, of the several objectives for the LMI EE/BE Portfolio outlined by the Commission in the May 15, 2025 Order is the objective to provide clarity and certainty on program guidelines, goals, and budgets to market participants, including the minimization of volatility in program budgets. DPS Staff are working with Program Administrators to create alignment between programs and the Commission's objectives for the portfolio.
Virtual	Are there best practices to indicate energy burden for households that pay for heat vs. those where it is included in rent/maintenance?	This is a good question and one that DPS Staff will explore further.
Virtual	I've seen data from other states showing that every dollar spent on weatherization generates a return of 3-4 dollars in savings. Do we have any data from NY?	Staff do not have a statewide cost to benefit ratio for weatherization investments on hand. However, program impact evaluations conducted on ratepayer-funded programs include evaluated program savings. Program evaluations are filed to DMM.
Virtual	The "40% of funds" to be utilized in DACs, is that disparate from what utilities can provide their customers or is there some way for utilities to tap into the funds to provide better services for DACs?	The 40% of funds refers to the CLCPA requirement for the State to invest program dollars in a manner for DACs to receive 40% of the benefit from those investments. The State has operationalized this requirement using the dollars invested as the primary approach to determining benefit. DPS is responsible to ensure that all ratepayer funding (through utilities and NYSERDA) going to clean energy and energy efficiency is deployed in a way to achieve the 40% DAC investment/benefit requirement overall. (answered by DPS Staff in Webex Q&A)

Barriers to Residential Weatherization in Disadvantaged Communities: Questions & Answers

Source	Question/Comment	Response
Virtual	Apologies, why can't Gen Z folks access the incentives that allow renters to benefit from a clean energy transition if they borrow units at market rates? Is it simply because their renting, the state of the economy in terms of interest rates, or a combination of the two?	Marisa Sotolongo (DPS): My understanding is that since there are more Gen Z people who are renters than other populations, and we know there's a disconnect between renters and accessing incentives, is that correct? Jenna Lawson: Yes, and then I would say also that the overall housing burden cost even for homeowners, because of mortgage rates, low housing stock, and how they find themselves—even if they are considered market rate, a huge portion of their income is going to housing.
Virtual	Can you speak to MWBE participation or interest in contractor pools, or if there ways to support MWBE pathways to EE/BE as a way of also lowering barriers for all contractors?	Erin Griffin: I feel like in the North Country, we'll take whoever we can get! I hadn't thought about it specifically through that lens. Jenna Lawson: In our region, each county and sometimes even the city will make contractors do an additional certification to prove that they're an MWBE, which adds another layer onto it. Even if it's very clear that a business is an MWBE, the burden of proving that that person is a sole or primary proprietor is actually really hard. You also have to look at the systemic environment of who's working in it now. It's primarily white men, as you can see on contractor calls pretty clearly. Making it an intentionally inclusive space, where I'm not being called "sweetheart," would I imagine go pretty far down the line for others as well.
Virtual	What does this slide (47) mean with the different shadings of the Hub areas? Finger Lakes and Southern Tier grayed out?	This was a diagram pulled together by the presenters noting which Reginal Assessments and Barriers Analyses reports contained findings on that point that the presenters were making. (answered by DPS Staff in Webex Q&A)

Program Administrator Round Robin

One- to Four-Family Programs

NYSERDA – Courtney Moriarta, Director of Home Modernization Team

- EmPower+ LMI Program
    - Currently operating at a pace of about $13-14 million per month in incentives going to about 1700 homes on a monthly basis
    - In 2024-2026, approximately 33% of expenditures went to DAC census tracts
    - Introduced a $200 bonus incentive for the contractor if they brought a project into the program that was aligned with the Inflation Reduction Act HEAR program. Of HEAR projects processed since mid-2024, about 27% received the $200 DAC incentive.
    - Highest DAC expenditures per capita were in Monroe, Herkimer and Wayne Counties. Highest DAC expenditures as a percent of population were in Monroe and Erie Counties.
- Comfort Home Non-LMI Program
    - Deployed in 2020 in the middle of the pandemic and has grown to a successful program from a slow start
    - Served 15,000 homes to date; $30M budget allocation from EE/BE Order
    - Current pace is about 450 projects and $1.2M incentives per month
    - Deployed a $200 DAC bonus incentive in January 2026 to see if it would increase participation in DACs, but it has not moved the needle at all, with uptake in the single digits.
    - Penetration is highly dependent on the contractors. Participation in the program is driven by boots on the ground and word of mouth.
- Marketing Effort
    - Data-driven marketing tool to hyper-target digital marketing campaigns to geographic DACs. Test-launch in late 2025 aimed at promoting Energy Advisor website. Planning to use again for upcoming residential campaign this year. Results will be tracked and part of future reporting.
    - Need to proceed cautiously with marketing efforts, since EmPower+ is a budget-bounded program and is not undersubscribed right now. Important to manage marketing efforts to avoid overheating the program and getting into a situation where there's a need for waitlists and things like that.

Orange & Rockland (O&R) – Siobhan Keane-Revie, Section Manager, Customer Energy Services

- O&R ran a small residential weatherization program during the New Efficiency: New York (NENY) program cycle from 2020 to 2025
- Served ~30-35 customers per year for a total of 209 over six-year period
- Total expenditure of $250,000 in incentives resulting in 80,000 lifetime MMBtu in energy savings
- Strategies for program uptake in DACs have included:
    - Team with hands-on experience working in weatherization
    - Grassroots effort working with community-based organizations like Catholic charities, libraries, food banks, houses of worship, and Regional Clean Energy Hubs to build a reliable referral pipeline

    - Upcoming Powering Equity event: 25 community-based organizations will be attending; focus on sharing information about programs to pass on to constituents; similar event planned for September to keep dialog going. Early signs of engagement [around Regional Residential Weatherization Programs] are encouraging.
    - Current focus on balancing act between program being streamlined enough for contractors to sell and customers to navigate, but rigorous enough to hold up to a thorough evaluation.

Central Hudson Gas & Electric – Aisha Kutter, Residential Energy Efficiency Program Manager

- Small residential weatherization program recently wound down. Served 184 participants.
- One strategy deployed with great success over the last ten months is a DYI home energy assessment program in partnership with the Mid-Hudson Library System and the company HomeBoost
    - Customers check out a thermal camera kit
    - 10 library locations in DACs
    - Uptake was so great in first few months that they have expanded to more locations in Mid-Hudson and Ramapo-Catskill Library Systems
    - Customers get a PDF report and video upon completing the assessment and also learn about available State and Federal incentives and other programs they might be eligible for
    - Results indicate that program is reaching customers in need of weatherization work
- "Energy Savings Simplified" in-person events with Regional Clean Energy Hubs and other support service representatives
    - Invitation to customers who are eligible for HEAP, energy assistance programs
    - Hands-on Empower+ application support: at the first event, a third of customers who attended submitted an application, and that number increased at second event.
    - Third and fourth events planned for Sept. and Dec.

National Fuel Gas Distribution Corporation (NFG) – Andrew Emhof, Director of Energy Transformation

- Whole home weatherization offerings through the Conservation Incentive Program (market-rate 1-4 family residential) launched January 2025
- Weatherization offerings treated as a pilot to help NFG team understand the market, establish relationships with contractors in Western New York, and get acclimated with technologies and best practices
- Also helpful for understanding challenges in homes, including health and safety challenges like asbestos and leaking roofs
- Has served 108 homes, representing about a $375,000 investment
    - 17 homes served were in DACs

    - Higher average weatherization participation from homeowners in DACs compared to the rest of the market
    - Of the 17 homes that participated, $64,500 in incentives were paid, which represented 17% investment rate. This is slightly higher than what the market-rate programs have achieved overall, historically (about 14%), but well below the target of 40% investment in DACs.
- Limited history working to enhance program uptake in DACs but working to improve
    - Good feedback from the Western York Clean Energy Hub and have been incorporating some of their best practices
    - Have already implemented increased outreach, ensuring that outreach materials are available at community events and participating in as many events as possible
    - In progress: ensuring that there is program flexibility that includes allowing for stacking of certain measures
    - Planning to implement more frequent/timely tracking of investments in DACs, i.e. capturing whether a home is in a DAC as soon as an incentive invoice is received from implementation vendor
    - Considering expanding the incentive payment structure options such that an incentive can go right to the contractor, which would alleviate the need for a homeowner to pay for a measure upfront and receive a rebate later.
    - Considering possibility of enhanced incentives for homes in DACs, too early to determine if that will be implemented.

National Grid – Erik Pekkala, Category Manager for NY Residential EE Programs, and **Stella Schram,** EE Policy Analyst

- Total Home Comfort
    - Non-LMI weatherization program for National Grid residential gas service customers in NYC and Long Island, offering incentives for insulation, air sealing, and window replacements
    - Active 2021 – summer 2023 as part of broader company efforts to mitigate gas capacity constraints in downstate New York
    - Over 7000 projects completed
    - Program gained traction in late 2022 after building a network of over 100 participating contractors but ultimately, customer and contractor demand exceeded allocated budgets, leading program to pause and then close in summer 2023
    - ~15% of projects in NYC and 19% in Long Island were for customers in DACs. This can be described as organic DAC participation. Since primary objective was to mitigate gas system constraints, National Grid was not limiting or focusing outreach on DACs.
- KEDLI HEAT
    - Served Long Island LMI 1-4 family KEDLI gas service customers from 2017-2025

- 2025 was a record-breaking year for the program. It served over 1400 households (around 12,000 customers), a 69% increase in program participation from 2024, and spent roughly $12M.
- Closed out 12/31/25; going forward this market will be served by EmPower+.
- From 2021-2025, 69% of incentives went to DACs including low-income customers and 21% to geographic DACs only
- Main driver of KEDLI HEAT success was regular, constant outreach to customers all year round. This included refreshing the list of eligible customers week by week and sending seasonal messages. Found that repetition matters: multiple touch points with customers was really important; customers often needed 3-4 touch points before pulling the trigger on a project.
- Most immediate response was from postcards, which are more expensive to send than emails but help reinforce email marketing.

Con Edison – Sam Pastrick, Section Manager

- Weather Ready
  - Launched in 2020 and still in market; will be folded into downstate Regional Residential Weatherization Program
  - Weatherization program for 1-4 family homes serving Con Edison gas or electric customers, including delivered fuel customers with an active Con Edison account
  - Over five years from 2020-2025, spent roughly $9.5 million between incentives and related implementation services serving just over 5000 customers with projects
  - Limited DAC insights through this program because projects have been generally concentrated in Westchester County where there is a smaller proportion of DACs
  - For this reason, Residential Clean Heat program may provide better insights into DAC participation:
    - Launched a targeted DAC incentive in Dec. 2023 and saw immediate and sustained impact over next two years
    - Heavy clustering of projects in some neighborhoods characterized by diverse, multilingual communities (Northern Bronx, Southeastern Brooklyn, Queens) suggests that strategies such as leveraging local community and contractor networks and multilingual program materials have been effective

NY State Electric & Gas (NYSEG) and Rochester Gas and Electric (RG&E) – Kassi Murphy, Programs & Products Manager

- Home Insulation and Air Sealing Program (HIASP)
  - Launched as a pilot in April 2024 and relaunched in September 2024 following research on market barriers and conversations with contractors
  - In 2025, introduced fixed incentive of approximately $2,000 given to customers at time of installation, taken right off the invoice

- Introduced an aggregator delivery pathway, which has proven highly successful, accounting for approximately 70% of all of our completed projects. This took the administrative burden off of contractors that chose to utilize that pathway.
- Allowed smaller non-BPI certified contractors to participate in program, but required that they work with the aggregator who held BPI certification
- Currently 41 contractors enrolled in program, but about 20% are consistently submitting projects
- 902 completed projects in 2025; just shy of 300 projects completed through May of this year.
- RG&E program closed at end of May due to limited funding; NYSEG remains open
- Expenditures in 2025 were about $2.25M in NYSEG and $1.7 in RG&E; expecting similar levels this year
- Engagement with DACs includes working closely with Regional Clean Energy Hubs, maintaining strong presence at community events in DAC areas (102 DAC-specific events in 2025)
- Many of the DAC outreach efforts are concentrated in RG&E territory, where 32% (231,000 customers) reside in a DAC, as compared to 16% (191,000 customers) in NYSEG service territory
- Out of 1200 HIASP projects completed since 2024, only a handful have been in DACs
- Ongoing outreach and education and DAC communities remains critical to address lack of awareness of available programs and resources
- Partnerships and relationships with community organizations and targeted outreach efforts are valuable for building trust, loyalty, and increasing visibility.
- Utilized heat maps for targeted outreach to better focus efforts and reach higher priority communities in NYSEG territory
- In small business and commercial Clean Heat programs, have offered additional DAC enhanced incentives that are expected to drive participation
- Health and safety barriers continue to be a challenge. Some weatherization contractors will do mold mitigation, but beyond that, they must subcontract for specialized remediation, and this adds to the complexity, cost and time it takes to complete a project. It's an additional financial burden for those that can't afford it and may reduce conversion rates.

NYS Homes and Community Renewal (HCR) – Samantha Pearce, VP of Sustainability

- Weatherization Assistance Program
  - 50th anniversary this July; operated through HCR since the 1990s
  - Serves 1-4 family households earning 60% of Area Median Income (AMI) or below and multifamily buildings in which at least 60% of units are households earning 60% AMI or below
  - Federally funded through DOE and HEAP funds. Currently, there is a third source of funding through the Infrastructure Investment and Jobs Act (IIJA).

    - All funding deployed through Weatherization Network of 49 subgrantees. Information on how to find and access the subgrantee that serves a particular region can be found on the HCR weatherization website.
    - With annual allocation from DOE, on target to serve about 2300 units this year (July 1, 2025 – June 30, 2026)
    - Of initial IIJA allocation of $114 million, there is $45 million unspent. That is part of a $289 million award that can be expended through 2030. Once we hit 30% production on those funds, NYS will receive the balance of the funds and have the full $289 million to deploy to the market. With these funds, 5,300 units have been served out of a goal of 22,000 through 2029.
    - About 40% of those units served are 1-4 family projects and about 60% are in multifamily (5+ unit) projects across the state.
    - Weatherization Readiness Funds (WRF) from DOE: launched three years ago; so far NYS has been allocated just over $2 million. Can go towards any health and safety measure to allow the home to then be able to receive weatherization funds; the home is then required to enroll with WAP to complete weatherization services.
    - HEAP funds: have to complete 2,800 units; just over 1,000 completed to date
- Green Affordable Pre-electrification program (GAP)
    - $2 million from the NYS FY 25-26 State Budget for low-income single-family or multifamily homes for health and safety upgrades necessary for future electrification and/or deeper energy efficiency work
    - HCR allocated those dollars to 12 community action agencies or nonprofit groups across the state to deploy. The list can be found on the HCR website. Sub-recipients were required to demonstrate shovel-readiness as part of their applications, so most of those funds are already allocated towards viable projects that are in progress at this point.
    - An additional $3 million was appropriated in the FY 26-27 budget, and HCR will be releasing an additional opportunity to access those funds.
    - Unlike the WRF funds from DOE, GAP funds are allowed to be used for the pre-weatherization health and safety work that would be required to enable a property to receive any State or Federal funded energy efficiency or heat pump programs [as opposed to just WAP], e.g. EmPower+.
- HCR has some additional State funds that it has been deploying specifically for the installation of heat pumps
- Excited to be increasing the funding availability and sources that the existing HCR weatherization network can deploy across the state. The customer doesn't always care where the money comes from, they just want the thing they need fixed in their home or property. Having multiple sources of funding that can do different things funneling through the weatherization sub-grantee network is one of the updates HCR has been making to its program offerings so that they can be delivered to the market in a more streamlined way.
- There is some great work happening in certain areas where EmPower+ and weatherization sub-grantees are partnering together to braid both of those funding

sources on homes that have more needs than what either one of our programs can support based on our individual caps and rules.

Multifamily Programs

NYS HCR – Samantha Pearce

- Programs discussed above are available for both 1-4 family and multifamily properties
- One nuance specific to multifamily is the problem of split incentives. This is less of an issue in the regulated affordable housing space.
- With Federal stimulus money/IIJA funds, there is a requirement for multifamily work to meet David Bacon wage requirements which adds complexity to the program and requires briefing for subcontractors.
- Near completing the largest weatherization project in the whole country, a NYCHA property in NYC; over 900 units weatherized with IIJA funds. The IIJA funds come with multi-year budget conditions that make it possible to do really large projects like this one that couldn't be completed within one year.

Con Edison – Sam Pastrick

- Con Edison has two programs under the multifamily banner, the market-rate Multifamily Energy Efficiency Program (MFEEP) and the Affordable Multifamily Program (AMEEP), co-administered with National Grid, both active in some form since around 2009.
- From 2020-2025, MFEEP expenditures were just over $140 million in incentives and associated implementation costs, serving roughly 18,000 participants
- From 2022-2025, AMEEP expenditures (Con Edison only) were around $170 million in incentives and associated implementation costs, serving around 450,000 dwelling units, i.e. individual units within larger multifamily buildings
- Weatherization measures in both programs include attic cavity insulation, some roof deck insulation, wall insulation, window replacement, and air sealing
- Con Edison has had success installing weatherization measures in both MFEEP and AMEEP. Strong performance has been driven especially by attic cavity insulation through AMEEP. There is a high concentration of pre-war buildings in Con Edison's service territory, often affordable housing, and these are compatible with weatherization measures – attic insulation in particular – which has helped achieve cost savings.
- Recognizes a need to do more to reach "naturally occurring" affordable housing
- Co-ops and condos are a lesser tapped market for both affordable and market-rate programs
- In terms of serving DACs, the same general principles apply in the 1-4 family and multifamily market segments: leaning into contractor network, providing materials in a language- and community-accessible format, and trying to streamline program pathways to make them easy to engage with.

National Grid – Sam Howe, Lead Analyst, Customer Energy Management NY

- Has offered multifamily weatherization measures through AMEEP in KEDNY, KEDLI, and NiMo service territories since the program launched

- Served about 100,000 participants over the NE:NY period, defined as dwelling units, across the three service territories
- Incentive spend in DACs, including low-income customers, was about 84% in KEDLI, 56% in KEDLI, and 70% in NiMo electric and gas
- Looking forward, National Grid will continue to administer AMEEP together with Con Edison in its KEDLI and KEDNY service territories, while NYSERDA will serve the affordable multifamily market segment upstate. National Grid expects to support energy efficiency improvements for about 117,000 participants by delivering $88 million in incentives across KEDLI and KEDNY.
- In market rate portfolio, began offering weatherization incentives to downstate customers around 2021 and upstate customers in 2023.
- Expects to continue to scale in the EE/BE period as the emphasis shifts from lower-cost to high-impact, longer-lasting measures like attic cavity, roof insulation, and wall insulation.
- About half of program participants in market-rate programs downstate are in DACs. Upstate, 67% of electric and 75% of gas customers are in DACs.
- In AMEEP, hasn't felt that a DAC-specific incentive rate is the motivator those communities need. Rather, the strategies National Grid is pursuing are right-sizing incentives for weatherization, maybe a smaller building adder, and streamlining incentives and program processing to reduce the administrative burden.

NYSERDA – Pamela Miller, Senior Project Manager with NYSERDA Multifamily Residential Team

- Affordable Upstate Multifamily Program, AMP UP
    - Launched April 16th of this year
    - Budget is roughly $125 million through 2030, expected to support about 1800 buildings and more than 23,000 housing units
    - Goal in developing the program was to create a streamlined, customer-focused experience that makes it easier for building owners to move energy projects from concept to completion.
    - Integrated support model includes technical and concierge services designed to support participants throughout the entire project life cycle. Technical services can include building assessments, energy modeling, and project scoping, while concierge services are there to help guide participants through application development, project planning, implementation, and project completion.
    - For projects located in DACs, those services are available with no customer contribution.
    - From June through September of this year, NYSERDA will be taking AMP UP on the road through a statewide outreach campaign. Series of small events in approximately 10 regions across upstate NY to share information about the program; locations will include DACs wherever possible. Designed to foster conversation with owners of affordable housing properties and with contractors who are not yet a part of NYSERDA's multifamily contractor network.

Program Administrator Round Robin: Questions and Answers

Source	Question/Comment	Response
Virtual	Can AMP UP be combined with WAP?	Pam Miller: Yes. We can stack WAP funds with AMP UP incentives, and we are actively engaging with our HCR colleagues and other programs to make sure we're figuring out the most beneficial and efficient way for that to happen.
Virtual	Did Samantha say there was $3 million in this year's budget for the GAP fund? I thought it was $2 million again.	Samantha Pearce: My latest intel is that it landed at $3 million for FY 26-27. That isn't formal until I release a Notice of Funding Availability, but that is the last budget appropriation language that I read.
Virtual	Where can we find information about the [NYSERDA AMP UP] Roadshow we can share with folks?	Pam Miller: If you'd like to be invited to a Roadshow in your region, please contact the program team at multifamilyprograms@nyserda.ny.gov or your Regional Clean Energy Hub with your interest and we will be sure that you get an invitation to the roadshow nearest you.
Albany	We've heard during the panels today how the contractors are an important part of the process. Last year, we got the LMI EE/BE Order in May, and then soon thereafter, NYSERDA came out and said there were some concerns about funding streams, and they stopped accepting EmPower+ applications directly from the contractors. What we're hearing from the contractors, and I think from the Hubs, is that while the Order was saying, let's get more streamlined, let's get these processes more fluid so that we can get more jobs done, more projects completed, we're hearing that actually, the opposite is happening and there's more review and more things that are happening. And I think that's particularly important because the Commission has basically directed all of the LMI work to happen through NYSERDA. Is NYSERDA going to	Chris Coll: There's a double-edged sword, because even though we have, as a state, put a lot more money into EmPower+ than we have historically, there's still a budget. So the question is, how do you handle all of the in input – in terms of the project pipeline coming from contractors, coming from utilities, coming from Hubs, coming from outreach and marketing that's happening just generally – and also balance that with the available budget. The one thing I'll say on the project pipeline that the Commission also prioritized, is that we want to make sure that those customers that have the highest energy burdens are getting served. That puts another kind of emphasis on utility referrals into the program. Not to speak for NYSERDA, but that's where they're having to figure out the best way to balance all of those basically competing sources of referral. Courtney, in terms of the mechanics of the program, like, administratively, do you want to speak to where the where the program is? Courtney Moriarta: An update on the issue of the contractors not being able to submit applications on behalf of the customers: we did open that up in March, for contractors to be able to submit applications for their customers if they're categorically eligible for the program. So if a customer has to submit their own financial documentation, they still have to do submit it

Source	Question/Comment	Response
	streamline that process and open it up now that we have record amount of money from RGGI, from the state, and from the PSC? It seems like the money is there.	themselves. But if they're submitting as someone who's a HEAP participant or through some other categorical eligibility, the contractor can do that for them. So we did open it up partially. But yes, we spent most of last year working on really getting a good solid budget available for the program that we can see and forecast out for a few years. So now, we're really focused on maintaining a steady pace and a predictable pace that everyone can become accustomed to, rather than having to deal with these kind of bubbles that happen when we get a big influx of money and then it's not replenished. The one other thing I'll say, to the heart of your question, how are we ensuring that we are getting to the point where we're doing what the commission wants done? For the LMI programs, the DPS staff team has advanced a performance management process where we're having quarterly meetings where we're actually looking at how the programs are doing across all of those kind of program design and implementation considerations. We're developing a reporting framework that will include looking at how fast projects are happening, and that sort of thing. So, we're expecting that over the next six months to a year, we'll continue to build the foundation for performance management. And it's not that the PAs are doing anything intentionally to slow projects. It's that these are complicated projects, and especially if you're talking about a program administrator's dealing with multiple funding sources, there's a lot of administrative challenges there. So I think we want to look at this collectively, as a larger group, and figure out how to improve what's happening. That's definitely on our radar.

Oakland EcoBlock Pilot: Questions and Answers

Source	Question/Comment	Response
Albany	There are three areas that without all three of them, you're dead in the water: the social	Therese Peffer: We started off with a feasibility study, so this project has essentially been going on for 10 years, and I think that helps build a team. Yes, we did feel that

Source	Question/Comment	Response
	organization piece in the neighborhood, a really collaborative municipality, and I get the sense you have a really strong team. In the region where I live, it's very hard to line up these three things. When you took these proposals in the city, first, were there a good number of runners-up? And second, did you have any thoughts about how to strengthen some of these missing pieces?	both the utility and the city of Oakland were strong partners in this, but we also have a deep bench in terms of contractors, architects, engineers, and lawyers and so forth. To be clear, the Energy Commission was interested in a lot of different approaches. This was one approach. Each of the four teams funded by the commission chose different approaches as part of the Advanced Energy Community program. Most of the funding went towards these upgrades, so we tried to use rebate programs when we could, but we found a lot of rebate programs fell through. We thought we were going to get funding from three different sources, and they all fell through at different times. So it was difficult to rely on that kind of funding. Rich Brown: Having a municipal government involved is one approach. It could be a county government, in a more rural area, or some other type of organization. Ultimately, even with the municipal government involved, probably the city isn't going to be delivering these services and actually running a program. I think they'd be a strong sponsor and a way to publicize the program, and, for some of the municipal changes – things like changing permitting process, or those sorts of things – only the city government can do that, or the county. Another approach I've heard about is doing this through rural co ops, if there's an electric co-op in a rural area, more structured as a utility program. So there are a variety of ways that this model could be implemented. It doesn't have to be this partnership between the city and some CBOs. Ultimately, that's the model we pursued, but it doesn't have to be that.
Virtual	I've been thinking a lot about the fear around unpermitted work. Aside from amnesty, have you all thought about municipal partnership to support other professional services (e.g., design, construction management)?	Rich Brown: One of the things Oakland is in the process of thinking through is how they can streamline their permitting process to allow these sort of bulk projects. Utility interconnection applications are done at the meter level, the individual utility customer, and building permits are at the address or the parcel level. These projects that span multiple utility customers in multiple parcels kind of breaks that mold. And so we're trying to think through, how would the city streamline permits that are applications for multiple projects within an area? Because one of the ways to achieve economies of

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		scale is that the contractor can come in and do multiple jobs, not simultaneously necessarily, but in a very short window of time, and you need all your permits lined up on all the properties that you're going to be treating. A situation where one permit gets approved one month, and then it takes a month or two for the next permit to get approved, is not going to help you achieve economies of scale. The same thing holds true with utility and interconnection permits for solar, or panel upgrades, or things like that. We tried to work with the local utility to have these treated as a package of applications, but their systems were set up to handle each one individually, and so it took a lot of internal manual coordination behind the scenes for the utility to try and bring these things along in a coordinated way.
Virtual	I appreciate that response, but I was actually more concerned about what Therese said about the fear around unpermitted work in buildings. I'm wondering if you had approached that conversation with the city through your work around amnesty, and thought about other professional design services that might be necessary in order to remediate and bring things up to code, in good standing, to move buildings through the higher order interventions on the properties, in order to get them to be participants in the microgrid or whatever.	Therese Peffer: When we first started the project, we had some people that said, We don't want to participate, because we have had bad dealings with the city. So we met with the city, a number of times, and they agreed at one point that – this part of the amnesty – that they wouldn't be penalizing people unless there were health and safety issues. Which is understandable, you know, if there's mold, or asbestos, or bare wires or whatever it is. They have been a partner in this; they're developing the amnesty program, and part of that is training their inspectors. It just started. They're just developing the amnesty program now, and it was in conjunction with our contractors and engineers, and so forth, so that they could hear some of the problems that are in the field and try to address them in their policy changes. Rich Brown: Unpermitted rental units are another issue that we ran into. Say somebody converted their garage into an ADU, a small apartment without permits – how is that handled when a building inspector comes? That's part of the set of issues that Oakland is thinking through how to address.
Albany	Where did the impetus for this project come from? Did it come from the university, the Energy Commission, or some other entity?	Rich Brown: The EcoBlock concept originated with architecture at professor at U.C. Berkeley, originally targeted at new construction. He was thinking about it in the context of these new cities that China was building in the 2000s. And then we adapted it to the existing residential renovation space. So it existed before the

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		Energy Commission came up with this advanced energy communities research program. When they put out a call for proposals, we saw that there was a good fit there, so we applied. In that planning phase, there were something like a dozen different projects around state that were funded to do planning, a very diverse set of projects. And then there was this down-select to four projects for the actual construction phase. So I'd say the concept existed, but the state of California, I'm not sure exactly how it got interested in this idea of community energy systems, and how communities can transition to clean energy more easily, in a scaled way.
Albany	How did you select the contractor?	Therese Peffer: That was through recommendations from one of our partners, AEA [Association for Energy Affordability], that was doing the assessment and working with this contractor. We really wanted someone who has been electrifying for, in our case, 18 years – we thought that was critical, and having someone who was willing to work with us, design with us, and think outside the box in some cases.
Albany	Did you keep track of real property transfers during the course of project?	Therese Peffer: There were three properties sold during this transition. Two of them we were able to get on board, and one we were not. Rich Brown: There were several tenants moving in or out during the project as well.
Virtual	What was the timeline for implementing the in-building work, everything from the weatherization upgrades, to solar, to electrification? Where were there delays or accelerants from the neighborhood scale approach? It sounds like sequencing permits might have caused delays, curious about where it helped.	Therese Peffer: We chose the block in April 2020. And as you can imagine what was happening in the world in 2020, that very much impacted the project. We had a bunch of delays, so we think that there were some economies of scale [that we were not able to realize] and we hope to see more on the next one. Also, in the process of applying for the service upgrades, PG&E decided that we needed to upgrade the service on the block. Truth be told, when we were choosing our blocks, PG&E looked at one of the blocks with a 4kV line, the distribution line, versus a 12kV line. And so I think we all knew in the back of our heads that this might be an issue, with voltage flickering or whatever problems that they have on the block, that they might need to replace it. Well, that delayed the project by about 18 months. So I can tell you what our pathway was for this

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		one, but I don't know how typical it would be, because we experienced a lot of delays from other outside forces. Rich Brown: One of our lessons learned from that was that low-power electrification, where you electrify the home without having to upgrade the panel, we see as a crucial part to expediting these sort of projects in the future, without having to have these upstream impacts on the distribution grid.
Virtual	How were these projects funded? California has a Residential PACE finance program, but New York does not have this. Did owners use this method, or other resources?	Rich Brown: To answer the question about PACE, we did not use that for this project, we paid for all the upgrades with grant funds. As part of the research project, we have outlined how this could be financed for a full-scale program. As Therese mentioned, tariffed on-bill financing using private funding, blended with subsidies from public programs for qualifying residents, seems like the most scalable approach. One issue working with a specific block/neighborhood is that the residents will span a range of income levels and not all will qualify for the same programs.
Virtual	Thank you Rich Brown for your answer regarding PACE. While such a demonstration project could be financed through grants, to scale this, grants will not be viable. It is reasonable to expect that rebates will cover some share, but not all costs. I am curious how private capital financing can be recovered through an on-bill mechanism? Did you identify private capital willing to provide financing to such work at scale?	Rich Brown: We completely agree that grants can't scale for the capital upgrades needed for building retrofits. We only looked at broad classes of financing, not specific lenders. I also think using subsidies to buy down interest rates is another important approach. If you have more questions I can put you in touch with our team member who developed the financial model, reach out to Therese at the email address in her slides, or richbrown@berkeley.edu
Virtual	Too bad smart panels are still so expensive	Rich Brown: There are many cost-effective options to electrify without doing a smart panel. For example see this guide: https://www.redwoodenergy.net/research/a-pocket-guide-to-all-electric-retrofits-of-single-family-homes
Virtual	Can you expand on the HOA and how it impacts the residents?	Therese Peffer: The HOA was originally designed to support the microgrid ownership; we are testing how this works for co-ownership of rooftop solar: some folks had better roofs for solar than others, some can afford

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		insurance/pay for damage than others, so we want to test how this works to have the community own/insure the solar. Regarding the HOA: we are working with Ivy Energy to take a percentage of the solar savings each month for each member to pay HOA fees. [Added: We think tariff on bill financing may work for in-home work. PG&E just announced a program.]

Facilitated Discussion

In response to the question, "What strategies can residential weatherization programs adopt to increase participation in disadvantaged communities?," conference participants offered the following points for discussion:

- There is problem of awareness and understanding of available programs. Better resource mapping, including infographics and flow charts, is needed to help address this problem.
    - When the Regional Residential Weatherization programs launch, there will be significant consolidation of programs in the Non-LMI space. However, the landscape of Non-LMI and LMI program opportunities remains complicated, and the need for better resource mapping persists.
- Programs could be bundled or braided further upstream, to relieve the burden of bundling or braiding at the regional, contractor, or customer level.
- There is a need for better interagency administration and coordination, for example between HEAP and OTDA.
- There is a tension between targeted outreach to disadvantaged communities or other priority customer segments, communities, or geographies, and the need to work within available budgets. The programs will have to continue to work to balance these imperatives.
- Customers with the highest energy burden are a priority for EE/BE programs, but these customers can be difficult to identify because many of them heat with delivered fuels. Delivered fuels customers are often unaware of EE/BE programs and may fall through the cracks of the referral system. Lack of consumption data for delivered fuels is also a challenge for program evaluation.
- Increasing LMI budgets could help address some of these issues. At the same time, disadvantaged communities are made up of both LMI and Non-LMI customers, so strategies are also needed on the market-rate side to increase adoption of EE/BE programs and services.

- There is a need for unified messaging about weatherization/clean energy as an affordability strategy, to combat politically motivated misinformation.
- There is an opportunity to examine flexibility in pre-electrification weatherization requirements across LMI and Non-LMI programs.
- Energy audit/study requirements should be aligned across different programs and project stages, particularly in the multifamily sector. It is also helpful in working with communities to have access to technical and design details in the early stages of a project and a mechanism for incorporating input or feedback.
- Customers in disadvantaged communities who do not qualify as low-income still face financial barriers to EE/BE program participation. This can be due to historic disinvestment in communities, low home values, and high debt-to-income ratios generally. One solution might be to expand EmPower+ eligibility in disadvantaged communities or allow moderate-income customers in disadvantaged communities to access low-income incentive levels. Another possibility is to consider tiered incentives within the Non-LMI programs, for example with higher incentives for customers within the 80%-120% AMI bracket in disadvantaged communities.
- There may be advantages to allowing the Regional Clean Energy Hubs greater flexibility to fund pre-weatherization health and safety measures.
- Contractor capacity is a major need in rural areas, especially as the utilities launch their regional weatherization programs.
- Mitigating contractor risk is key to getting them to participate and retaining them in EE/BE programs. One example of contractor risk is the EmPower+ permit documentation requirement, which is challenging because it depends on the capacity of county permit inspectors, who often face a large backlog. In some cases this results in out-of-pocket costs for contractors. Some possible strategies for mitigating contractor risk include standardizing contractor accreditation requirements and standards across all programs and establishing a Green Bank revolving loan fund for contractors at a very low interest rate.
- The State should consider support for entrepreneurs in the EE/BE sector, for example to help people launch new home performance businesses in underserved areas and encourage Minority- and Women-Owned Businesses (MBWEs). Existing incubator infrastructure for service and tech businesses could be leveraged.
- Neighborhood-scale projects can incorporate workforce development by offering opportunities for on-the-job training for residents of the buildings being served.
- There is interest in proactively planning how and when program funding should be reallocated if and when it is not expended in a timely manner. DPS clarified that at the end of the recent New Efficiency: New York and Clean Energy Fund budget

cycles, many programs were fully expended or over-expended. If budgets end up being available after a program cycle ends, the Commission determines what to do with them. In some recent instances they have been used to help reduce ratepayer collections for the next cycle.

- There are multiple perspectives on financing as a component of increasing weatherization activity in disadvantaged communities.
    - There is some concern that financing opportunities will not increase program participation in disadvantaged communities unless offered at 0% interest, at which point it may be helpful in reaching customers in the 80-120% AMI bracket.
    - There is interest in what the New York Green Bank (NYGB) can do to support EE/BE projects. The Commission issued an order on the NYGB in January 2026 setting new investment targets and emphasizing the need to help provide capital to local lenders. NYGB is currently working on a finance plan for disadvantaged communities and LMI households, due July 22, so we can expect more conversations about this over the next few months.
    - The Utilities and NYERDA have been discussing what kinds of financing will be available to support the Regional Residential Weatherization programs as they prepare to launch.
    - Financing for residential clean energy projects is currently available through NYSERDA. Customers may be eligible for an on-bill recovery or an Energy Smart loan For more information visit the NYSERDA website- https://www.nyserda.ny.gov/All-Programs/Residential-Financing-Programs.