Home Modernization Program Update

Scott Oliver, Associate Director
David Friello, Program Manager
Erik Gilbert, Senior Project Manager
Steve Wagner, Senior Project Manager

EmPower +
Virtual Energy Assessments (VEA)
Comfort Home

November 6, 2026

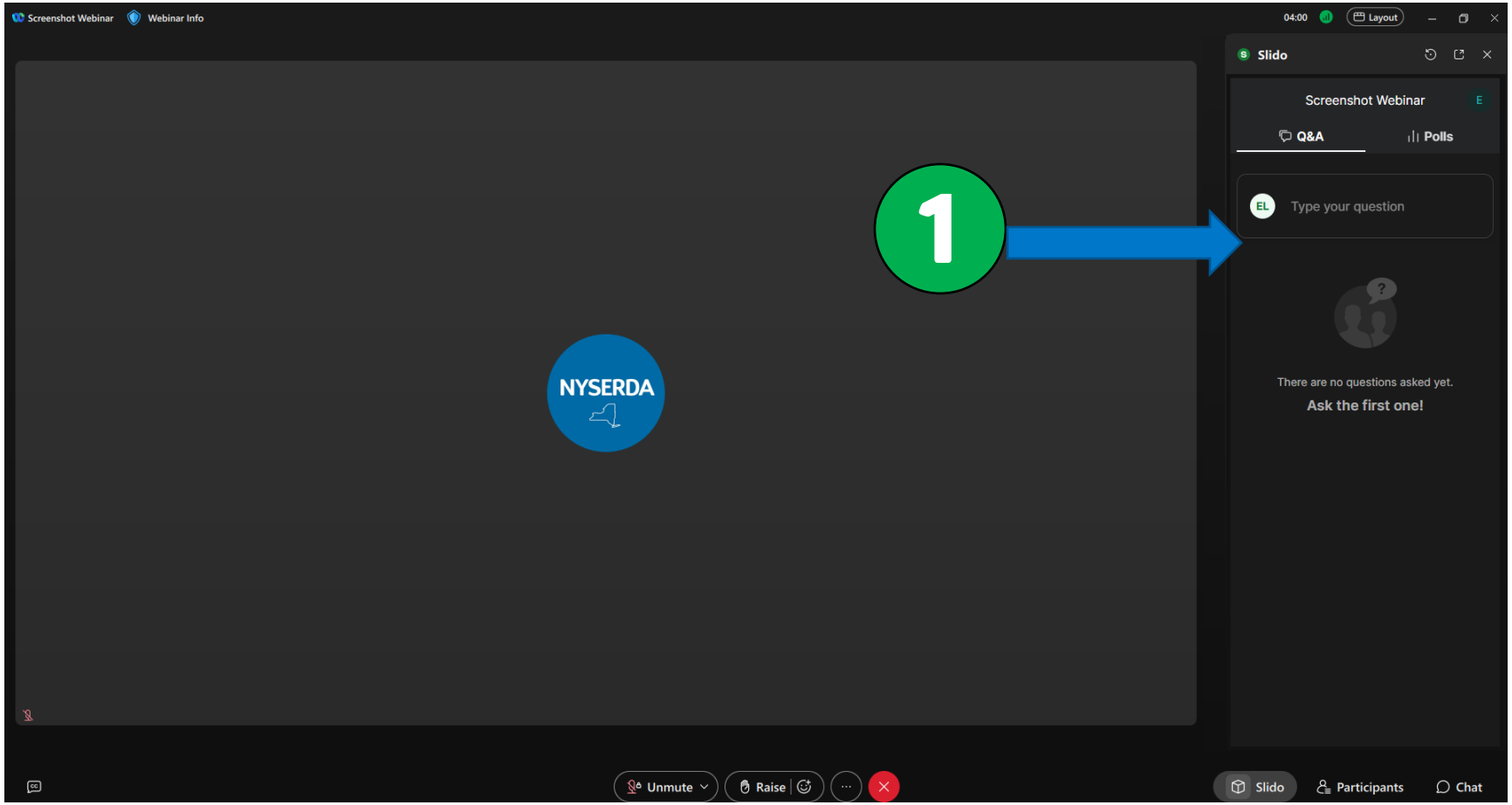


NYSERDA
New York State Energy Research and Development Authority

Options for Q&A During Today's Webinar - Text

OPTION 1 - TEXT

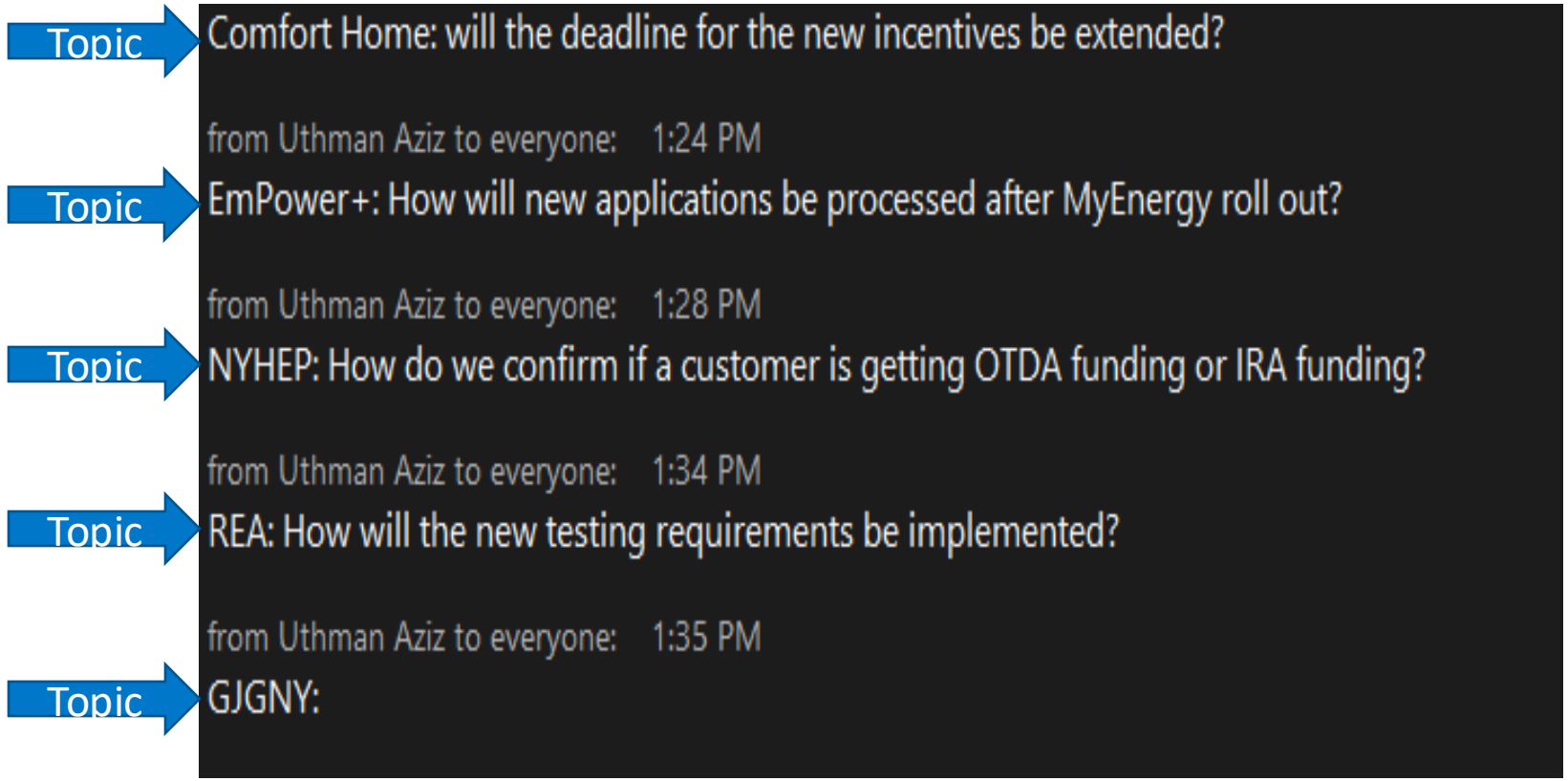
- Locate slido panel in the right portion of your webinar panel.
- Type your question as prompted into the text field and click "send."



Format of Q&A During Today's Webinar

Topic: [Type your question]

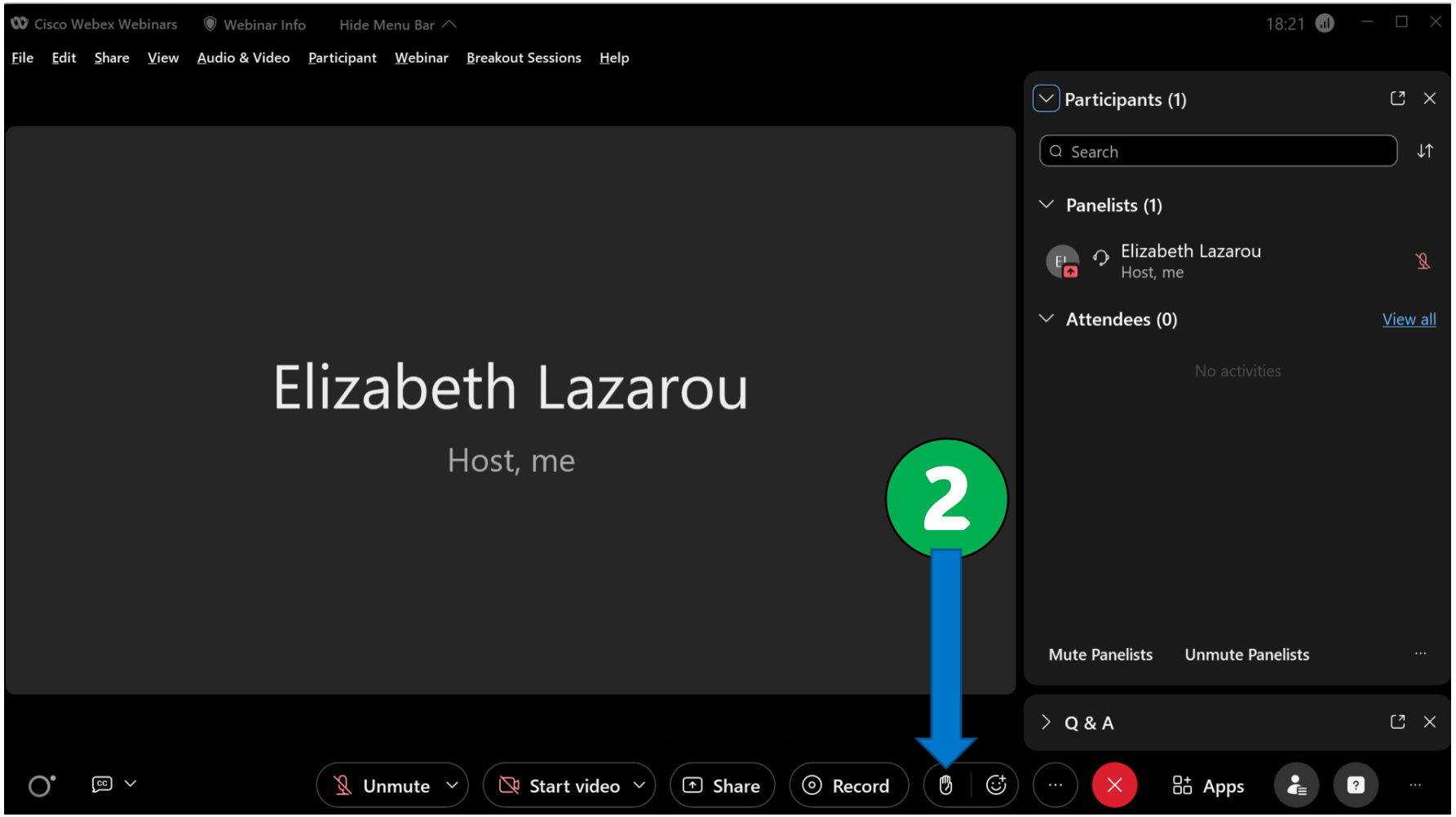
- Please list your topic first followed by a colon sign.
- Type your question pertaining to the topic after the colon sign.
- This will allow the Host to align the questions with the topic being presented.
- ***Please note that specific inquiries and topics not covered during today's agenda, i.e., enrollment number or client name can be addressed through the standard customer or contractor support options (Slide 4).***



Options for Q&A during today's webinar Mic/Phone

OPTION 2 - MIC/PHONE

- Locate the “raise hand” icon in the toolbar at the bottom of your screen.
- Click on the raise hand icon to let the host know you have a question.
- The Host will indicate when you have been sent a request to unmute. Click on the unmute request to ask your question verbally.



Support questions should be directed to:

Please send your email to only <u>ONE</u> of the email addresses listed below, using both causes duplicative work for the implementation teams.

Customer Engagement and Enrollment Contractor

- Implementor: TRC
- 1-866-NYSERDA
- 1-877-NYSMART (Customer Support)
- info.residential@nyserda.ny.gov
- Call-center support for customers to answer questions about program offerings and assist with customer enrollment and applications to EmPower+. Process customer applications for EmPower+ and provide income verification services for program incentives.

Program Operations and Technical Support

- Implementor: CLEAResult
- 1-800-284-9069, calls will be routed to person best able to assist
- support.residential@nyserda.ny.gov
- Customer support once an application has been approved as well as programmatic and technical support for contractors in the EmPower+ and Residential Energy Assessment and Comfort Home programs.



Today's Agenda:

Comfort Home

- Comfort Home Program Sunsetting
- Comfort Ready Metro & Upstate NY Overview

EmPower+

- RMAG
- Holiday Hours & Invoice Schedule
- No-Heat Season Overview
- Vendor Responsibility Form
- Polar Vortex Case Study
- EmPower+ Case Studies

Important Reminders

- Audit Only
- LED Lighting
- Local Hub Coordination



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New York State Energy Research and Development Authority

Comfort Home Program Sunset

- On January 1, 2027, as required by the EEBE order, utilities in New York State will launch *Comfort Ready Metro New York* and *Comfort Ready Upstate New York*, new market-rate residential weatherization programs through 2030.

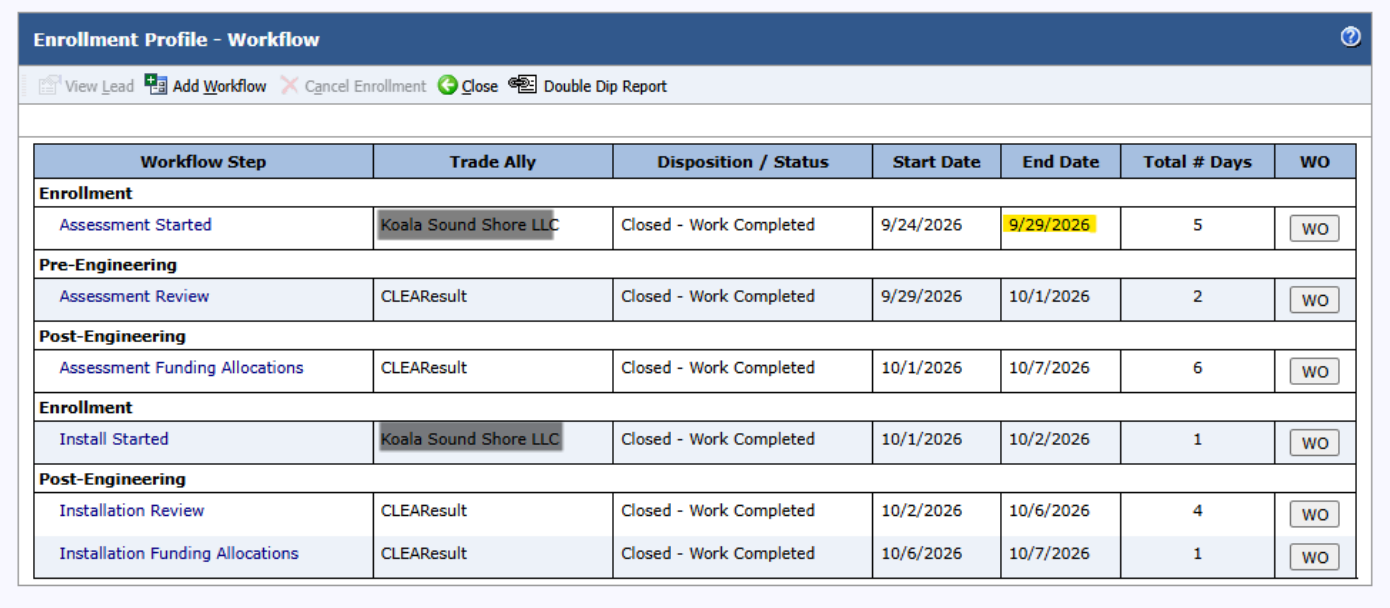
- These utility programs will provide incentives for weatherization upgrades for New Yorkers and will replace NYSERDA's Comfort Home program

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Comfort Home Program Sunset

Dec 31, 2026 - Final Day for Enrollment Submission

- Fully modeled home with recommendations
- Contract – signed and dated
- Utility Release Form - signed and dated
- Any Necessary Pre-Installation Photos



Enrollment Profile - Workflow

View Lead | Add Workflow | Cancel Enrollment | Close | Double Dip Report

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	WO
Enrollment						
Assessment Started	Koala Sound Shore LLC	Closed - Work Completed	9/24/2026	9/29/2026	5	WO
Pre-Engineering						
Assessment Review	CLEAResult	Closed - Work Completed	9/29/2026	10/1/2026	2	WO
Post-Engineering						
Assessment Funding Allocations	CLEAResult	Closed - Work Completed	10/1/2026	10/7/2026	6	WO
Enrollment						
Install Started	Koala Sound Shore LLC	Closed - Work Completed	10/1/2026	10/2/2026	1	WO
Post-Engineering						
Installation Review	CLEAResult	Closed - Work Completed	10/2/2026	10/6/2026	4	WO
Installation Funding Allocations	CLEAResult	Closed - Work Completed	10/6/2026	10/7/2026	1	WO

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Comfort Home Program Sunset

March 31, 2027 - Final Day for Enrollment Completion

- Standard QA will continue for 3 months
- Customer requested QA will continue for 12 months
- Contractors will be expected to resolve installation issues during this time.

Contractor NYHEP Access

- Jan 1, 2027 – Contractors can not create new assessments / enrollments
- April 1, 2027 – Contractor can not process workflow steps
- April 1, 2027 – March 31, 2028 – Contractors will continue to have read only access to NYHEP
- April 1, 2028 – Contractors lose full access to Comfort Home NYHEP Workflow

NEW YORK STATE | NYSERDA

Continue to use support.residential@nyserda.ny.gov

COMFORT READY METRO NEW YORK

conEdison nationalgrid

COMFORT READY UNY NEW YORK

Central Hudson A FORTIS COMPANY

Orange & Rockland

NYSEG · RG&E Part of the Avangrid family

nationalgrid

National Fuel®

NYSERDA Contractor Meeting

November 6, 2026

Comfort Ready Metro & Upstate NY Overview

Comfort Ready Metro & Upstate New York

- What is the Comfort Ready Program?
- What is the Territory and Coverage?
- Milestones to Launch

Comfort Ready New York: Coordinated Program Offering

- **Metro:** Jointly managed residential weatherization program for all Con Edison and National Grid Customers in NYC, Westchester, & Long Island
- **Upstate**: Jointly managed residential weatherization program for all National Grid, NYSEG/RG&E, Central Hudson, Orange & Rockland, and National Fuel Gas customers

Forecasted Budget and Project Counts for 2027 - 2030

Region	Budget	Projects
Upstate	$285M	70K
Metro	$183.5M	24.2K

- Pooled budget available to all customers in respective regions
- Same measure/incentive offerings for all customers in respective regions
- Same Program Manual and Application Portal/Process in respective regions

Comfort Ready Metro NY: Service Territory

Participating Utilities: Con Edison & National Grid in NYC, Westchester, and Long Island

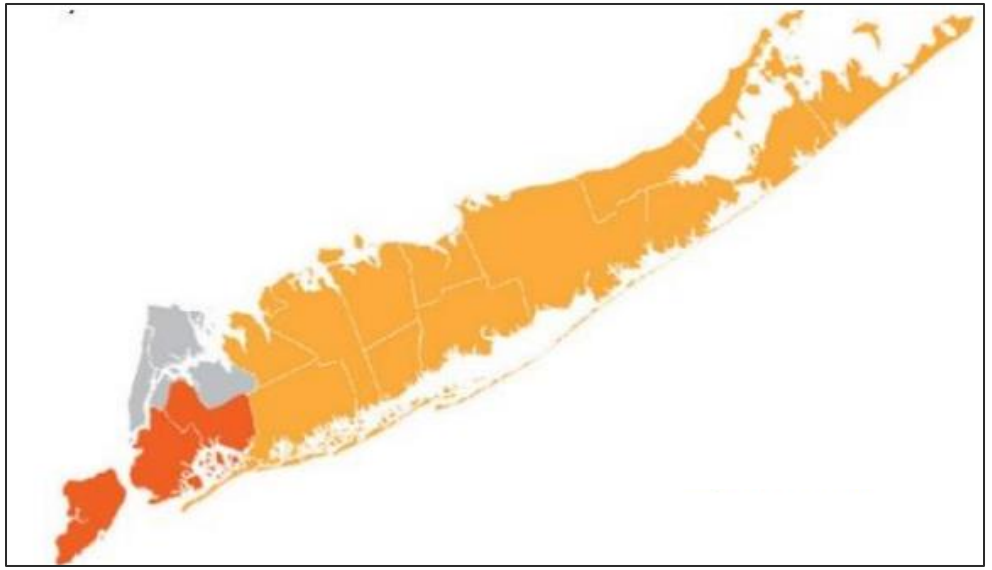
Con Edison of NY (CECONY)



Electric and Gas

Electric Only

National Grid

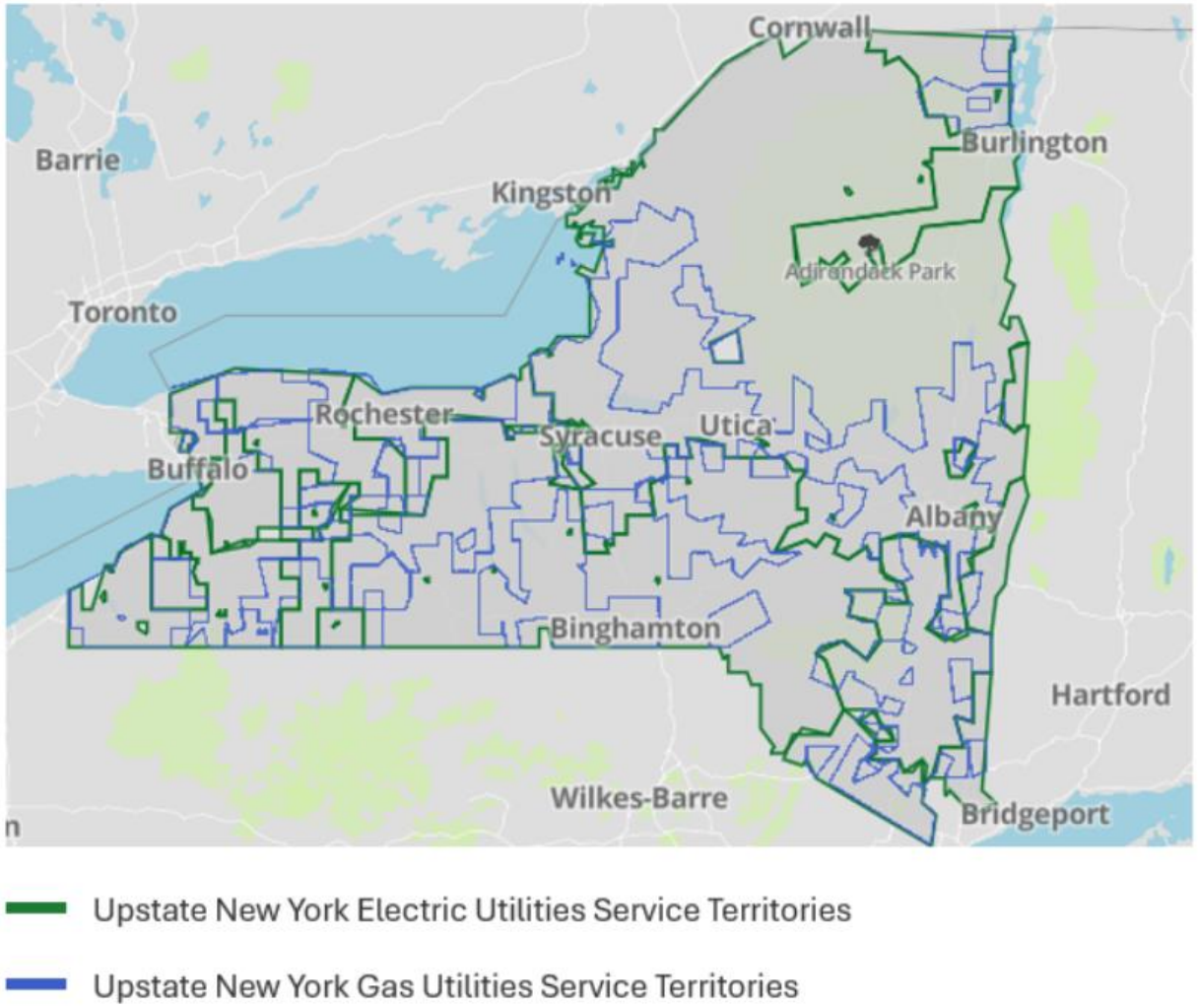


KEDNY Gas

KEDLI Gas

Comfort Ready Upstate NY: Service Territory

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



Comfort Ready New York: Milestones to Launch

Milestone	Metro	Upstate
Contractor Roundtables held for feedback	September 22, 2026	September 24, 2026
Utilities filing Implementation Plan with DPS	November 1, 2026	
Participating Contractor Enrollment Officially Opens	November 16, 2026	Early December
Release of final Program Manual	January 1, 2027	
Participating Contractors can begin submitting applications	Early January 2027	

NOTE:

- Only installations completed on or after 01/1/27 or later will be eligible for program incentives.
- Con Ed's Weather Ready and NYSEG RGE HIASP program stopped accepting applications and will sunset by the end of 2026.
- NYSERDA's Comfort Home program will continue accepting applications until the launch of the Comfort Ready Metro NY Program.

Program Details

Customer Eligibility

- Single-family home or small multifamily property (1 – 4 dwelling units)
- Customer fits into one of the following categories:
  - Heats primarily with natural gas by a participating utility
  - Heats primarily with electricity (including electric resistance, air source and geothermal heat pumps) by a participating utility
  - Heats primarily with a delivered fuel (for example fuel oil or propane) and receives electric from a participating utility
- The home must:
  - Not be new construction (a home never lived in)
  - Not be a gut renovation project (a renovation that removes material down to structural load-bearing beams)

Only installations completed on or after 01/1/27 or later will be eligible for program incentives.





Proposed Customer Incentives: Comfort Ready Metro and Upstate NY

Measure Package	Minimum Required Measures	Maximum Incentives*
Comfort Ready Basic	• Air sealing • Attic insulation • Rim joist insulation **Exemptions** will be allowed for *rim joist insulation only* if rim joists do not exist, are already insulated, or are inaccessible. Justification & proof will need to be provided.	**Metro:** Up to 40% of the total project cost or $5,000, whichever is lower **UNY:** Up to 40% of the total project cost or $3,250, whichever is lower.

Comfort Ready Enhanced	• All 3 *Comfort Ready Basic* measures (air sealing, attic, rim joist)
	• Exterior wall insulation
	• At least 1 of the following additional measures:
	  • Floor over Garage (Garage Ceiling)
	  • Floor over Crawl Space/Basement (Crawlspace/basement ceiling)
	  • Floors over Ambient (cantilever or overhangs)
	  • Crawlspace/Basement Wall
	  • Garage Walls (to living space)
	Exemptions will be allowed for (1) *rim joist insulation* per note above and (2) *attic insulation*, if already insulated to program standards. Justification & proof will need to be provided.
		Metro: Up to 40% of the total project cost or $6,000, whichever is lower
		
		UNY: Up to 40% of the total project cost or $4,250, whichever is lower.

Returning "Comfort Ready Basic" participant	For previous Comfort Ready Basic participants only. They may return to install exterior wall insulation and one of the "additional measures" listed under Comfort Ready Enhanced.	40% project cost cap up to $1,000
Returning NYSERDA Comfort Home participant	For previous NYSERDA Comfort Home Package A participants only. They may return to install exterior wall insulation and one of the "additional measures" listed under Comfort Ready Enhanced.	40% project cost cap up to $1,000

**Incentives are under review by the Department of Public Service; final approved incentives will be captured in the Comfort Ready Metro & UNY Program Manuals.*

Proposed Contractor Support

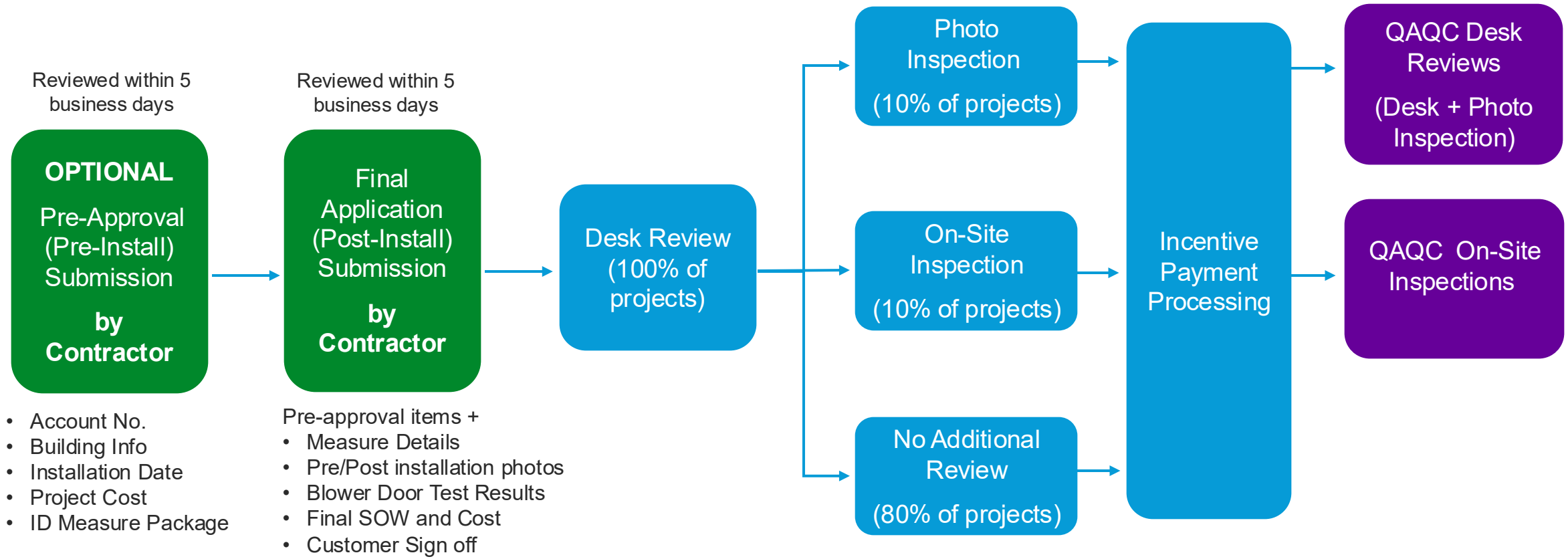
- **Contractor Assessment Payment**
  - Only paid for completed projects (pass all program reviews/inspections)
  - Final $/project amount is $300
  - Will not count against the 40% project cost cap

- **Growth Bonus**
  - Only paid for completed projects (pass all program reviews/inspections)
  - Lump sum payment to be distributed quarterly based on YTD achievement
  - Project targets are TBD and will be the same for each Participating Contractor
  - Will not count against the 40% project cost cap

Incentives are under review by the Department of Public Service; final approved incentives will be captured in the Comfort Ready Metro & UNY NY Program Manual.

Application Lifecycle Overview: Metro

Contractor Action | Program Admin Action | 3rd Party QAQC Action



- Account No.
- Building Info
- Installation Date
- Project Cost
- ID Measure Package

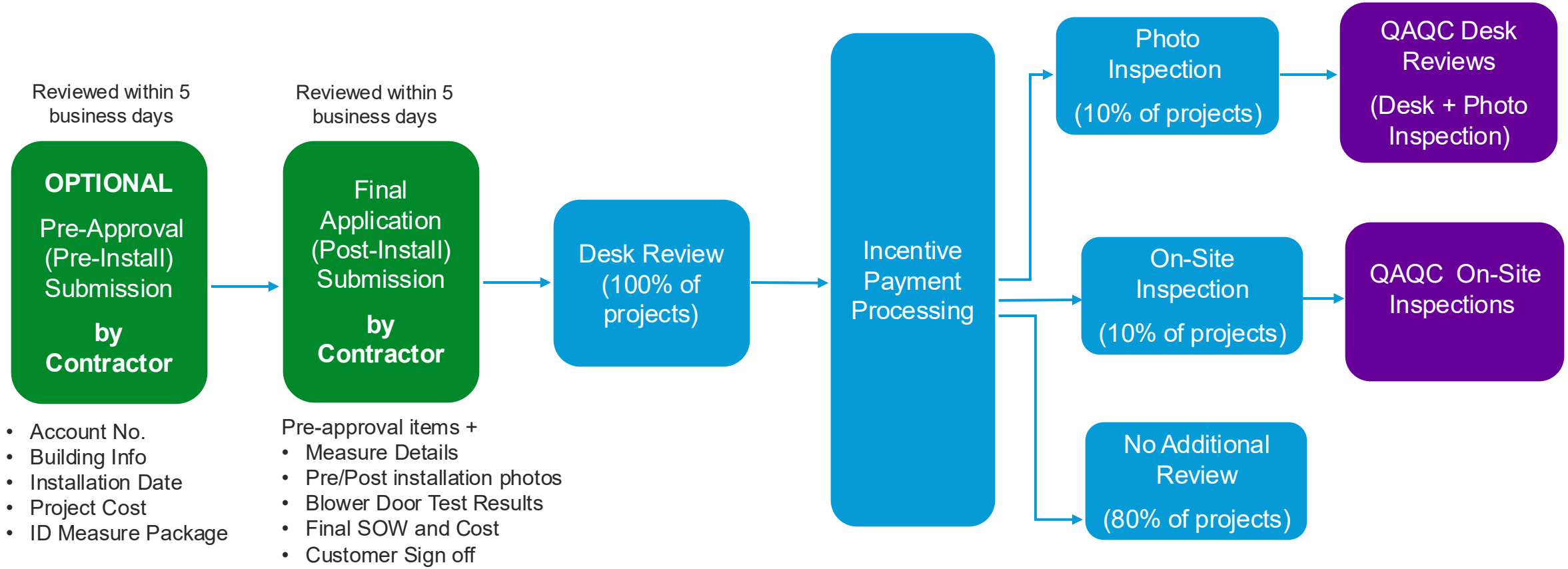
Pre-approval items +

- Measure Details
- Pre/Post installation photos
- Blower Door Test Results
- Final SOW and Cost
- Customer Sign off

Final Applications must be submitted within 30 days from the Install Date

Application Lifecycle Overview: Upstate

Contractor Action | Program Admin Action | 3rd Party QAQC Action



Final Applications must be submitted within 30 days from the Install Date

Contractor Allocations – Long-term Plan

- **Individual Budget Allocations** for high-volume Participating Contractors
  - Assigns a fixed annual allocation, broken into quarterly amounts, to each high-volume contractor
  - Funds will be deducted from the allocation upon submission of pre-approval application. If a contractor decides not to use the pre-approval pathway, funds will be deducted at the time of final application submission.

- **Funding Pool** for low-volume Participating Contractors
  - Shared budget that will be available on a first-come, first-served basis
  - Funds will be deducted from the allocation upon submission of pre-approval application. If a contractor decides not to use the pre-approval pathway, funds will be deducted at the time of final application submission.
  - Participating Contractors in the Funding Pool will have visibility into the remaining available pool balance.
  - Participating Contractors may graduate out of the Funding Pool and receive an individual budget allocation.

Contractor Onboarding Requirements

Submit:

- Signed *Participating Contractor Agreement*
- Certificate of Insurance
- Completed W-9 Form
- All customer home assessments must be performed by someone that holds one of the following:
  - BPI Building Analyst Technician (BA-T)
  - BPI Building Analyst Professional (BA-P)
  - BPI Energy Auditor
- Active county/city home improvement license



Complete Onboarding Orientation and Training Sessions:

1. Program Orientation
2. General Program Requirements and System Training
3. Technical Requirements Training

Your Path to Becoming a Participating Contractor

Step 1: Learn and ask questions (Now!)

- Account Managers are available for introductory conversations with interested contractors

Step 2: Prepare

- Gather all required onboarding documentation
- Request & Read the draft Program Manual and Participating Contractor Agreement
    - Metro available early November 2026; Upstate NY available early-mid December

Step 3: Enroll (Metro: starting Nov 16, 2026; Upstate NY: Early December)

- Apply to become a participating contractor
- Upload all required documents for review
- Schedule your required training sessions with an Account Manager:
    - Session 1: General Program Requirements and System Training
    - Session 2: Technical Requirements Training

Step 4: Start work (January 2027)

- Early January 2027: Final Program documents released and applications start being accepted
- Reminder: Only installations performed on/after 1/1/27 are eligible for incentives

Next Steps

- For any questions, please email us at:
  - Upstate: info@comfortreadyuny.com
  - Metro: info@comfortreadymetro.com
- Review previous slide which provides detailed steps for onboarding
- **Remember:** we can only incentivize installations beginning **Jan 1, 2027** & only after completion of onboarding steps
- This slide deck will be shared out with all attendees

Pause For Questions

EmPower+

In-Person Residential Market Advisory Group (RMAG)

- Network, Exchange insights, and Discuss current market developments.
- Join breakout discussions designed to dive deeper on the emerging topics and challenges in New York Residential clean energy.
- Discussions will include:
  - Affordable Multifamily Upstate Program (AMP-UP)
  - Barriers to EmPower+ projects in NYC
  - Outcomes of the RMAG Geothermal Target Areas Working Group

Date: December 2, 2026

Time: 8:00a.m. – 5:00 p.m.

Location: Courtyard by Marriott Saratoga Springs, 11 Excelsior Ave, Saratoga Springs, NY 12866

Questions should be emailed to: resmarket@nyserda.ny.gov

Staff Hours for Thanksgiving

NYSERDA: Closed on Thursday, November 26th with limited staffing on Friday, November 27th.

CLEAResult: Closed Thursday, November 26th and Friday, November 27th.

TRC Call Center: Closed Thursday, November 26th and open Friday, November 27th
Note: EmPower+ application processing is closed on Thursday and Friday.

Invoices:
With the holiday, there will only be one EmPower+ incentive invoice processed during the week of November 23. Incentive invoicing processing will return to twice per week beginning the week of November 30. Comfort Home will process a weekly invoice on Wednesday, November 25 as usual.

EMPOWER+ NO-HEAT GUIDELINES

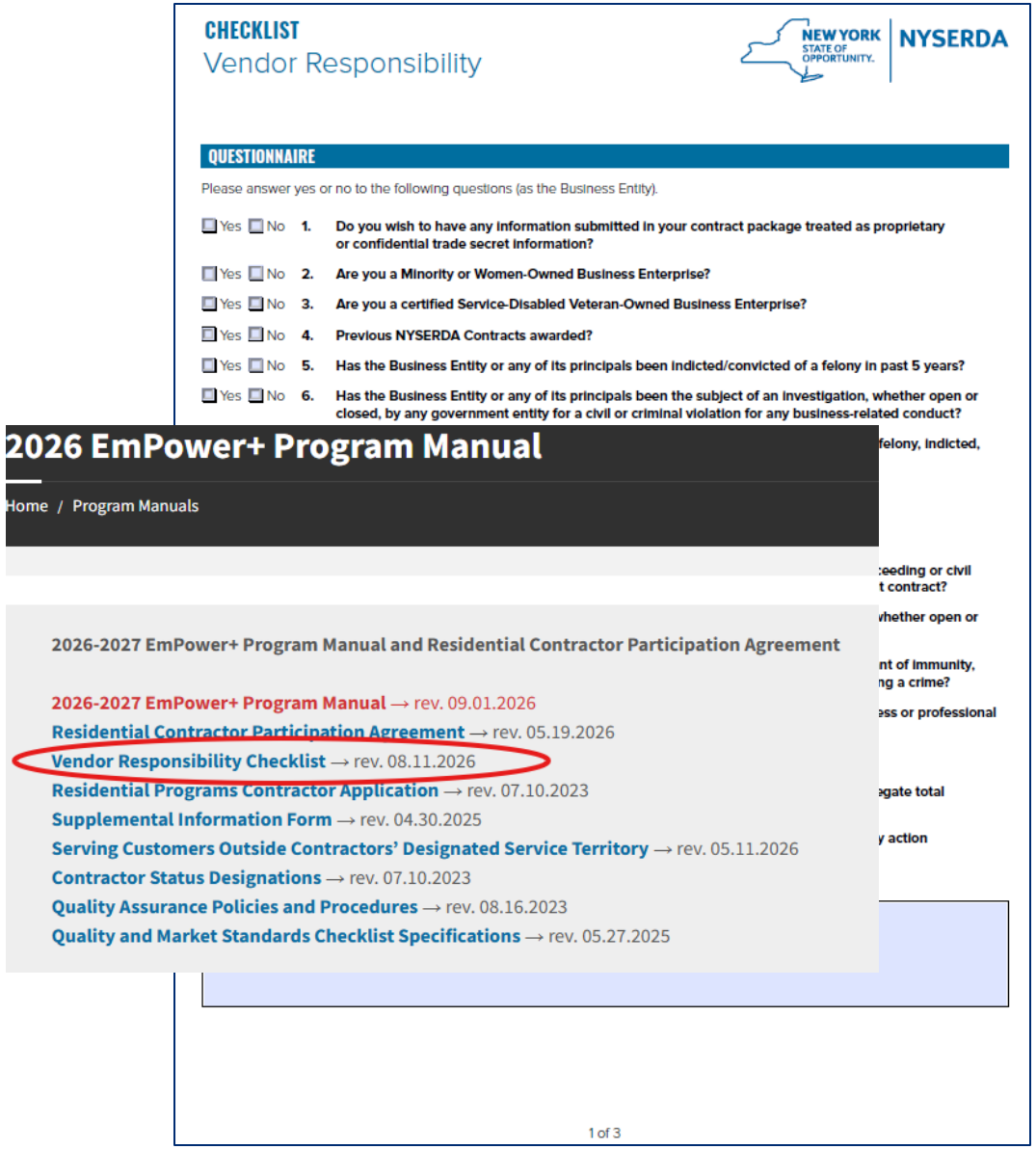
- As a reminder, EmPower+ may only be used as a last resort option for no-heat emergencies where the homeowner has already exhausted all other public assistance options to obtain a functioning heating system.
- **Customers must first apply to OTDA Heating Equipment Repair and Replacement (HERR) Program before applying to EmPower+ for No-Heat assistance.**
- **The total available No-Heat funding for the 2026-27 heating season is $1,000,000.**

A No-Heat Resources page on the contractor support site will provide ongoing updates of the available funding.

- **Contractors are expected to complete No-Heat emergency Installations within seven calendar days of workscope approval.**

Vendor Responsibility Checklist

- All EmPower+ and Comfort Home Contractors **must** complete and return a NYSERDA Vendor Responsibility Checklist.
- This document is available to download from the Contractor Support site.
- Please complete and submit to support.residential@nyserda.ny.gov by November 13th.



CHECKLIST
Vendor Responsibility

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QUESTIONNAIRE

Please answer yes or no to the following questions (as the Business Entity).

Yes No 1. Do you wish to have any information submitted in your contract package treated as proprietary or confidential trade secret information?

Yes No 2. Are you a Minority or Women-Owned Business Enterprise?

Yes No 3. Are you a certified Service-Disabled Veteran-Owned Business Enterprise?

Yes No 4. Previous NYSERDA Contracts awarded?

Yes No 5. Has the Business Entity or any of its principals been indicted/convicted of a felony in past 5 years?

Yes No 6. Has the Business Entity or any of its principals been the subject of an investigation, whether open or closed, by any government entity for a civil or criminal violation for any business-related conduct?

2026 EmPower+ Program Manual

Home / Program Manuals

2026-2027 EmPower+ Program Manual and Residential Contractor Participation Agreement

2026-2027 EmPower+ Program Manual → rev. 09.01.2026
Residential Contractor Participation Agreement → rev. 05.19.2026
Vendor Responsibility Checklist → rev. 08.11.2026
Residential Programs Contractor Application → rev. 07.10.2023
Supplemental Information Form → rev. 04.30.2025
Serving Customers Outside Contractors' Designated Service Territory → rev. 05.11.2026
Contractor Status Designations → rev. 07.10.2023
Quality Assurance Policies and Procedures → rev. 08.16.2023
Quality and Market Standards Checklist Specifications → rev. 05.27.2025

1 of 3

POLAR VORTEX CASE STUDIES

A Case Study on Twelve NY State Homes

Study Summary

- 12 single-family homes across 10 regions of the State
- All three Department of Energy climate zones in New York State represented
- No fossil fuel backup heating was used during the study
- Whole-home systems sized to 100%–150% of the Manual J-calculated heating load
- 2025–2026 winter heating season, including three polar vortex weather events



https://www.nyserda.ny.gov/About/Publications/Featured-Case-Studies/Polar-Vortex

EMPOWER+ CASE STUDIES

The EmPower+ Program team is looking for case studies to promote online. We are asking EmPower+ contractors to help with this effort by passing along successful projects with positive customer experiences, to the Program team.

Categories we are interested in promoting online include:

- Heat Pump projects
- Air Sealing & Insulation projects
- Full Comprehensive projects
- No-Heat Projects

We are looking for projects that tell a story of savings, improved comfort, positive program experience, etc.

Case studies will be shared online with the intent to promote EmPower+ and increase program adoption.

Contractors should forward any potential case studies to: uthman.aziz@nyserda.ny.gov

Pause For Questions

Reminders

REMINDER EMPOWER+ AUDIT ONLY PROJECTS

Effective January 1, 2027, participating contractors must **submit and complete** comprehensive work scopes.

Standalone home energy assessment projects will be discontinued.

The Program has had an increase in home energy assessment only projects where another contractor weeks later completes another home energy assessment and submits a comprehensive workscope.

Having multiple home energy assessments for one project is not cost effective for the program and is confusing for the customer, who also needs to make time for multiple home visits.

The participating contractor can install the measures or use a subcontractor to install the measures.

A comprehensive work scope should include one of the following, air sealing, attic, wall, rim joist insulation or an upgraded HVAC system.

NYSERDA understands that there may be situations where a contractor will only complete a home energy assessment; however, the intention is to avoid these as a majority of a contractor's overall projects.

LED Lighting

Effective **January 1, 2027**, LED lighting/bulbs will no longer be eligible for incentives through EmPower+ per the requirements of the EEBE order.

Projects with lightbulbs in approved workscopes can proceed but no new light bulb measures can be added to projects.



Contact Contractor Support with questions
support.residential@nyserda.ny.gov.

CLEAN ENERGY HUB COORDINATION

- Coordinating with your Clean Energy Hub where possible, helps make your job easier!
- The Hubs have been tasked with assisting NY residents navigate this space. If you are reached out to by one of the Hubs, please be responsive.
- https://www.nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs



Final Questions