

Multifamily Energy Efficiency and Building Electrification Program Manual

For Market Rate and Affordable Multifamily Housing

March 31, 2026

Version 1.1

*The requirements found in this Program Manual are effective for completed application packages, as defined in Section 6 of this Program Manual, that are submitted on or after **March 16, 2026**. Applications submitted prior to March 16, 2026 will be governed by the program manual and rates in effect at the time the application was submitted, unless otherwise expressly stated by the applicable Utility. These requirements will remain in effect until a new version is published. Submitted applications will be eligible for the requirements in effect on the date of application to the Program.*

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1. Introduction

The **Multifamily Energy Efficiency Program** (“MFEET”) and the **Downstate Affordable Multifamily Energy Efficiency Program** (“AMEET”) (collectively, the “Program”) offer incentives for installing energy-efficient and electrification upgrades in existing multifamily buildings, subject to the terms and conditions set forth in this MFEET and AMEET Program Manual (“Program Manual”). Energy efficiency and electrification can help improve customers’ bottom line by reducing energy use, maintenance costs, and greenhouse gas emissions while increasing operating efficiency. Program Manual contains the rules and requirements of the Program.

This Program Manual supersedes and replaces all prior MFEET and AMEET program manuals with respect to applications submitted on or after March 16, 2026, except where a prior manual is expressly incorporated by reference for a specific purpose.

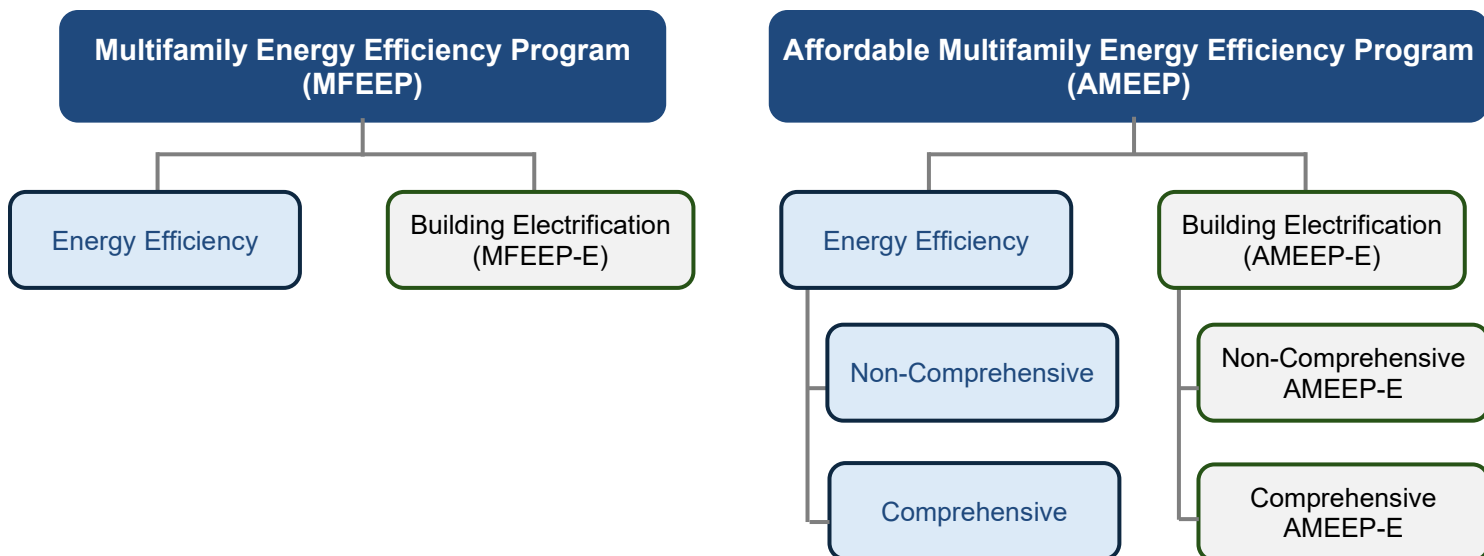
MFEET provides incentives for market rate multifamily buildings that receive electric and/or gas delivery service from Consolidated Edison Company of New York, Inc. (“Con Edison”), subject to the eligibility requirements set forth in this Program Manual. MFEET incentives are not available to National Grid market rate gas customers. Such customers should refer to National Grid’s multifamily offerings available at: <https://www.nationalgridus.com/NY-Business/Energy-Saving-Programs/Multifamily>.

AMEET provides incentives for Affordable Housing multifamily buildings for electric and gas Con Edison customers and National Grid gas customers. AMEET is jointly administered by Con Edison and KeySpan Gas East Corporation d/b/a National Grid (“KEDLI”) and The Brooklyn Union Gas Company d/b/a National Grid NY (“KEDNY”) (collectively “Utilities”), each acting solely with respect to customers receiving delivery service within its respective service territory. The Programs are implemented on behalf of the Utilities by Willdan Energy Solutions, the Implementation Contractor (“IC”), acting solely as an agent of the applicable Utility and without independent authority to bind any Utility.

Both MFEET and AMEET offer incentives for energy efficiency and electrification upgrades:

- **Energy Efficiency:** weatherization, electric and gas energy conservation measures, and secondary savings
- **Building Electrification:** electrification of space heating and/or domestic hot water systems, including measures previously offered under Con Edison’s Clean Heat program offering for existing multifamily buildings, as further described in this Program Manual

AMEET includes both non-comprehensive and comprehensive pathways. Non-comprehensive incentives are generally intended for smaller-scale projects, while comprehensive incentives are intended for larger retrofit projects involving multiple eligible measures. Eligibility, incentive structures, and applicable requirements for each pathway are described in Section 5 of this Program Manual. The graph below provides a general summary of incentive opportunities within each program for illustrative purposes:



This Program Manual is the controlling document governing participation in the Program. Certain technical, inspection, and informational documents may be issued in connection with the Program, including:

- MFEET & AMEET Technical and Inspections Guide
- [Con Edison Energy Efficiency Program Guidelines: Building Electrification](#)
- [MFEET & AMEET Incentive Fact Sheet](#)

In the event of a conflict between this Program Manual and any companion document, this Program Manual takes precedence unless the companion document expressly states otherwise.

To get started, determine your project's eligibility and path described in Section 4, complete an application package described in Section 6, and speak with one of the Utilities or the IC with any questions about your energy efficiency or building electrification project. Participants must submit a complete application package and receive a written Notice to Proceed ("NTP") from the applicable Utility or its IC before any work begins to be eligible for incentives.

2. Incentive Guidelines

The Program provides financial incentives to customers, or to Participating Contractors ("PCs") acting on behalf of customers where expressly authorized by the customer and approved by the applicable Utility. Please refer to the [Incentive Fact Sheet](#) for available incentives. These incentive levels are subject to change any time at the Utilities' sole discretion and subject to applicable law and regulatory requirements. The Utilities may provide notice of incentive changes through email or other reasonable means. PCs and customers are responsible for monitoring Program communications, including communications from the Utilities and IC. Incentive changes shall apply prospectively, except as otherwise expressly stated.

Required Customer Contribution

Incentives are intended to offset a portion of eligible project costs, subject to the maximum incentive cost coverage limits outlined below and all other Program requirements.

Table 1: Maximum Incentive Cost Coverage as a Percentage of Total Project Cost

Program	Energy Efficiency Measures	Building Electrification Measures
MFEEP	Up to 70 percent of project costs	Up to 50 percent of project costs
AMEEP	Up to 85 percent of project costs <i>(National Grid comprehensive projects are capped at 70 percent of project costs)</i>	Up to 85 percent of project costs

Project costs are calculated as the sum of approved costs for all measures included in the approved project scope, as determined by the applicable Utility in its sole discretion. Customers and/or PCs found to be in violation of the incentive cost coverage requirements may be subject to disciplinary action, repayment obligations, incentive claw backs, and/or offsets against future incentive payments, as determined by the applicable Utility.

Incentive Caps

For Con Edison-administered projects, incentives will be capped at the applicable project cost cap or \$1,000,000, whichever is lower, unless otherwise expressly approved in writing by Con Edison in its sole discretion. Con Edison may, but is not required to, consider larger projects on a case-by-case basis. National Grid incentives will be capped at the project cost cap or \$500,000, whichever is lower.

National Grid AMEEP Incentive Caps for Attic Cavity and Above-Deck Roof Insulation

National Grid AMEEP attic cavity and above-deck roof projects will apply the following per project incentive cap for non-comprehensive projects:

- Attic cavity insulation project incentives will be capped at \$25,000 per gas account.
- Above-deck roof insulation project incentives will be capped at \$45,000 per gas account.

National Grid AMEEP incentive caps for non-comprehensive attic and above deck roof insulation projects are applicable to costs incurred for completed projects per gas account through December 31, 2026. If an Applicant intends to implement an insulation project in phases, the project would be considered complete only when all phases of the project are completed. The costs of the project would be based on the cumulative costs of completing all phases of the project at that gas account.

For questions regarding eligibility, definitions, or applicable incentive caps, applicants should contact the IC, subject to final determination by the applicable Utility.

Limited Time Offers

The Utilities may offer increased incentives to projects meeting certain criteria from time-to-time. Most often, these criteria will be based on the measure type and meeting established deadlines (for example, wall insulation projects will be eligible for a higher incentive rate if sold by June 1, installed by September 1, and

approved by October 1). The eligibility rules and requirements specific to the Limited Time Offer will be described upon the issuance of the offer. Any project that does not meet the rules and requirements of the Limited Time Offer will not be eligible for any increased incentive and will instead be eligible for the base incentive in place at the time the Notice to Proceed is issued. Projects must meet all remaining program rules to be eligible for the Limited Time Offer. Eligibility for any Limited Time Offer is not final unless and until confirmed in writing by the applicable Utility or IC.

Contractor Allocations

To manage Program budgets, the Utilities may preserve a portion of their incentive budget for high volume PCs. Allocations will be established for a defined timeframe (e.g., one calendar year). The Utilities may change a PC's allocation subject to the conditions established in the allocation documentation, which include reducing allocations because of a PC's failure to use the allocated amount or poor performance in the program. The Utilities may issue, revise, or withdraw allocations at any time. Contractor allocations do not create any entitlement to incentives or guarantee of funding and do not modify or waive any Program requirements.

3. Program Deadlines and Required Timelines

To be eligible for incentives the following Program deadlines must be met.

- **Pre-Installation:** Program applicants must schedule a pre-inspection and cure any flags or fails identified within thirty (30) days of the project being sold. A project is considered sold when all required application documents have been submitted through the IC's Project Submission Portal and the project has reached the designated "Application Complete" (or equivalent) stage, as determined by the IC. Projects that exceed this timeline may be subject to cancellation.
- **Installation Timeline:** New equipment cannot be installed before a Notice to Proceed is issued. Existing equipment must not be removed until a pre-inspection of the baseline conditions has been completed.

Table 2: Required Installation Timelines from the Date the Notice to Proceed is Issued

Project Type	Prescriptive	Custom
Energy Efficiency	3 months	6 months
Building Electrification	12 months	24 months
AMEEP Comprehensive	24 months	24 months

Projects that do not meet required installation timelines will be cancelled and will not be eligible to receive incentives unless prior written approval is granted by the Utilities in their sole discretion. Extension forms should be submitted in advance of the installation deadline; if an extension form is not received by the IC within one week of the end of the installation period, the project may be cancelled. The extension form template is available in the Document Library of the IC's online submission portal and may be emailed upon request.

Generally, AMEEP comprehensive must be completed in 24 months, and that will be reflected in the preliminary incentive offer letter. Due to the nature of AMEEP comprehensive projects, installations and project completions may extend beyond 24 months from when the project was initially committed (i.e., when the Notice to Proceed was issued). Therefore, the Program will allow for multi-year commitments extending past two years so long as the customer provides a project installation plan. Multi-year commitments will be provided depending upon available funding. If a project requires more than 24 months at the outset of the project, because of the scope or scale of the project, that must be requested at the outset and (at discretion of the Utilities) reflected in the preliminary incentive offer letter.

Acceptance or rejection of an extension request will be determined by the Utilities, and approval is not guaranteed. Customers and contractors must demonstrate a good faith effort to complete the project as was originally committed. Extensions are generally only granted where circumstances outside of customer or contractor control result in unforeseen project delays and regulatory constraints. No extensions will be granted beyond December 31, 2030.

- **Post-Installation:** Projects must be post-inspected and cured of any flags or fails identified by the post-inspection within thirty days of being notified by the IC of any flags or fails. Projects that exceed this timeline may be cancelled.
- **End of Year Deadline:** All projects must be completed (i.e., the project is fully installed, all documents are submitted, and site is ready for post-inspection) and in the “Install Complete” stage on the IC’s Online Portal by **October 30, 2026 AND** post-inspected, cured, and in the “Install Approved” stage on the IC’s Online Portal by **November 20, 2026** to be eligible for 2026 incentive rates. Projects that do not meet these deadlines may, in the Utilities’ sole discretion, be subject to revised or reduced incentive rates or changes to eligibility or program rules that result in the project no longer being eligible for incentives.
- **Con Edison Non-Wires Solutions Neighborhood Program (“NWS”) Deadlines:**
 - **NWS Adder**
 - **Jamaica:** Eligible adder projects follow communicated NWN Program deadlines.

NWS eligibility and deadlines are subject to change based on system needs and funding availability.

4. Program Eligibility

The following eligibility criteria apply to all MFEED and AMEEP projects. Additional eligibility requirements for AMEEP are listed further below.

- **Utility Customer:** The project must be served by a Con Edison or National Grid utility account that contributes to the System Benefits Charge (“SBC”), as determined by the applicable Utility.¹ Utility account eligibility checks are required for all projects.

¹ To be eligible for electric energy efficiency or building electrification incentives, the customer must contribute to the SBC for their electric usage. To be eligible for gas incentives, the customer must contribute to the SBC for their gas usage. Any contribution to the SBC is sufficient to qualify a customer to be eligible for weatherization incentives.

- **Measure Eligibility:** Eligible measures, existing condition requirements, proposed equipment installation requirements, and inspection criteria are set forth in the Multifamily Technical and Inspection Guide, as amended from time to time, subject to and governed by this Program Manual.
- **Building Eligibility:** The project must be an existing multifamily building(s) with five (5) or more residential dwelling units in each participating building.
 - **New Construction is not eligible for the Program.**
 - Commercial facilities, such as motels/hotels, group homes, dormitories, shelters, monasteries, nunneries, assisted living facilities, and nursing homes are generally not eligible for the Program. Eligibility determinations are made by the applicable Utility in its sole discretion, and such facilities may be directed to Con Edison's or National Grid's programs, as appropriate.
 - Supportive housing, single room occupancy ("SRO") facilities, and senior living residences that do not include nursing or hospitalization amenities are generally eligible for the Program, subject to Utility approval. To determine eligibility, the project submission must include, at a minimum, a signed memo on the customer's letterhead identifying the facility type, building address, total number of units, and the percentage of units designated for and/or occupied by long-term residents. The IC will review the submission and make a recommendation, subject to final determination by the applicable Utility. The Utility may recommend an alternative incentive pathway or program based on the characteristics of the building.
- **Buildings with Cogeneration or Combined Heat and Power (CHP) Plants** are subject to pre-approval by the applicable Utility. Eligibility depends on the proposed measure(s) and the operation of the plant, as determined by the Utility in its sole discretion. Please contact the IC for more information.
- **Extent of Renovation:** Gut rehabilitations, defined as renovations that remove building components down to structural load-bearing elements, are eligible for the Program subject to review by the applicable Utility. The following are not eligible:
 - Change of use of occupancy (e.g., from commercial to multifamily)
 - Reconstruction of a vacant structure or space within a structure (e.g., vacant properties being retrofitted to become multifamily)
- **Coordination with NYSERDA Incentive Programs:** Utility and NYSERDA incentives may not be combined to offset the cost of the same installed measure. In limited circumstances, projects may be eligible for both utility incentives and complementary NYSERDA program funding sources (e.g., project design and technical assistance). Total combined funding for any project may be limited or modified by the Utilities or NYSERDA at any time, in their respective discretion.
- **Con Edison Service Adequacy Requirements:** All projects that increase the amount of electricity or natural gas that are being used at the premise must follow Con Edison's procedures and submit their new or added loads to determine if their existing service is adequate. Projects may not be energized, and Con Edison incentives will also not be issued until the project is deemed service adequate by Con Edison, and all Program post-inspection requirements are satisfied. Refer to Section 5.3.5 for detailed service adequacy requirements.
- **Con Edison NWS Neighborhood Program and National Grid Gas Demand Response Adder:** Con Edison offers Neighborhood Bonus incentives to eligible electric customers with properties located on the Jamaica network in the Southeast Queens area. A customer account is eligible if the account is located within a qualifying NWS coverage area and receives electric service from a qualifying electric network or area substation.

- Customers' accounts located in the following neighborhoods may be eligible for the Neighborhood Program: Bellerose, Briarwood, Brookville, Cambria Heights, Floral Park, Hollis, Jamaica, Jamaica Estates, Laurelton, Queens Village, Rosedale, South Jamaica, St. Albans and the JFK International Airport area.
- The Neighborhood Bonus (informally known as the NWS Adder) pays additional incentives for replacing less efficient electric equipment with more efficient electric measures that help reduce energy peak demand in the NWS Jamaica territory. This Neighborhood Bonus is available on top of standard and promotional incentives already offered through MFEED or AMEEP. Combined incentives may, where expressly approved by Con Edison, cover up to 100% of the eligible measure upgrade cost, subject to all program incentive caps and requirements.
- Eligibility for the Neighborhood Bonus will be determined concurrently with eligibility for the underlying MFEED or AMEEP project, as applicable. Applicants only need to submit one MFEED application package to be considered for applicable Neighborhood Bonus incentives.
- Projects may participate through either the NWS Prescriptive or Custom Pathway. Measures submitted under the NWS Custom Pathway must be pre-approved by Con Edison prior to commencing work.
- Refer to the Multifamily Incentive Fact Sheet for eligible measures and incentives for 2026. Other custom non-lighting efficiency upgrades not listed in the Multifamily Incentive Fact Sheet may be eligible for performance-based NWS Neighborhood Bonus through the NWS Custom Pathway if they reduce electric demand during the Jamaica network peak (8pm – 9pm) and are pre-approved by Con Edison.
- **National Grid Gas Demand Response (“DR”) Program:**
 - AMEEP customers in National Grid's gas service territory who participate in and receive incentives through National Grid's Gas Demand Response program may, subject to National Grid approval and available funding, be eligible to receive a match of up to 20% of their Demand Response incentive matched by National Grid. To receive a Match, customers must commit to using their Demand Response incentive for a qualified Weatherization or Gas Measure. Applications for the Demand Response Incentive Match can be submitted to the Gas DR program teams at GasDR@nationalgrid.com and are accepted annually in April and May.

AMEEP projects have the following additional eligibility requirements:

- **Affordable Housing Requirements:** Only affordable multifamily housing properties are eligible for the AMEEP Program. Affordable housing is defined as projects in which at least 25% of the units are, or are expected to be, occupied by households earning not more than 80% of the area or State median income, whichever is higher. Affordable housing documentation must be submitted with the application package. There are two ways to qualify a project for affordable housing incentives:
 - Proxy: The Program allows certain proxies to represent compliance with the definition previously mentioned. The “Acceptable Documentation for Affordable Housing Eligibility” table (Table 3) lists eligible proxies and supporting documentation.
 - Rent Roll: This type of qualification may be used by projects that do not meet the proxy requirements. Twenty-five percent of the units must have a calculated household income no more than 80% of the State or area median income, whichever is higher, based on the assumption that 30% of household income is applied to housing costs (i.e., rent). Applicants

must submit the annual rent, size, and occupancy for each apartment on the property. A calculation spreadsheet tool is available on the IC's Online Portal document library for determining Rent Roll income eligibility.

- **Coordination with Weatherization Assistance Program:** Customers may apply for and receive incentives from both the AMEEP Program and the Weatherization Assistance Program; however, the total combined incentives may not exceed 100% of eligible project cost. Prior to commitment, the Participating Contractor must provide a breakdown of estimated costs and expected cost coverage from each program. The Utilities reserve the right to adjust or recoup incentives to enforce this limitation.
- **Project Pathway Limits:** Applicants are not permitted to apply for both comprehensive and non-comprehensive projects at the same time for the same building. If a comprehensive project is active and a building wants to include a new measure, the new measure may only be added to the existing comprehensive scope. If a building has completed a comprehensive project, it cannot submit a new application or a non-comprehensive project until 6 months after the comprehensive project incentive is disbursed. Any measure that has already been installed through any program pathway, or that is observed during pre-inspection, is ineligible for incentives and will be removed from the project scope.

Table 3: Acceptable Documentation for Affordable Housing Eligibility

Eligibility Proxy	Details	Documentation Required
US HUD, USDA-RD, and other Federally Regulated Affordable Housing	Properties receiving one of the following subsidies from HUD or USDA-RD (e.g., Public Housing Authorities, etc.) • Section 8 Contract • Sections 202, 236, 811	Copy of the HUD contract or contract award notice
NYSDHCR-Regulated Affordable Housing	Buildings with subsidized mortgages or contracts that place them under the regulatory control of NYSDHCR	Copy of NYSDHCR contract or contract award notice
Low Income Housing Tax Credits	Properties that receive low-income housing tax credits for at least 50% of their units	Copy of tax credit award notice from NYSDHCR or NYCHPD
NYCHPD-Regulated Affordable Housing (or other local housing agency)	Properties with loans, mortgages, or deeds of purchase (HDFC incorporation) from NYCHPD or other local housing agencies	Documentation of current mortgage, loan closing, HDFC incorporation or deeds
SONYMA mortgage insurance	Properties subsidized for low- to moderate-income multi-family residents with SONYMA subsidized financing through the HFA	Copy of loan closing/mortgage insurance award documents
Weatherization Assistance Program	Properties that have fulfilled the eligibility requirements for the Weatherization Assistance Program	Copy of the letter from the Weatherization Agency confirming the project's income eligibility
HFA 80/20 Program	Properties that have been accepted into the Housing Finance Agency's 80/20 Program	Copy of the award letter or HFA contract documents
NYCHDC 80/20 or Mixed Income Programs	Properties that have been accepted into the NYC Housing Development Corporation's 80/20 Program or Mixed Income Program	Copy of the award letter or HDC contract documents
Mitchell-Lama Buildings	Properties that are currently NYS or NYC supervised Mitchell-Lama buildings	Copy of NYSHCR or NYCHPD contract or recent annual report confirming active Mitchell-Lama status
NYC Department of Homeless Services (or other local homeless service agency)	Properties that serve as transitional housing facilities where a non-for-profit organization is the owner of the property	Copy of the NYC Department of Homeless Services (or other local homeless service agency) contract AND proof of ownership

5. Program Measure Overview

The MFEPP and AMEEP Programs include the following measures and participation pathways. Additional information on equipment eligibility and inspection requirements is included in the **Multifamily Technical and Inspections Guide**, which is incorporated by reference and governed by this Program Manual. This section of the document includes specific programs and measure eligibility.

5.1. Requirements Applicable to All Measures & Pathways

Warranty Requirement

All equipment that is newly installed as part of the energy efficiency or building electrification project receiving incentives through the Program must carry a minimum five-year manufacturer warranty covering parts and equipment, including major components such as compressors, fans, and motors, otherwise approved by the applicable Utility. To the extent offered by the manufacturer, the warranty should cover associated labor and repair or replacement of components or systems. Participating Contractors must warranty their work for a minimum of one (1) year following installation and remedy any material defects in work or workmanship, as required under their contract with the customer. All disputes concerning the work, workmanship, functionality of installed equipment, or impacts to the building incidental to the work performed are solely between the Participating Contractor and the customer.

Commissioning Requirement

Energy efficiency and building electrification measures typically involve installing new or modifying existing building systems and components. Building owner and operator education is important to the effective operation and maintenance of the upgrades so that projected energy efficiency savings can be realized. PCs must inform site owners and operators about system operation and maintenance, including instruction on the use of new systems and maintenance requirements for new and modified equipment. The Participating Contractor must educate site owners and operators about considerations and risks that may arise over the expected useful life of the energy efficiency or building electrification measure. For new equipment, the PCs must provide the customer with a detailed manufacturer's operation handbook as well as a maintenance manual containing information on the major components and a schedule of required system maintenance. The manual must include any startup/commissioning documentation used for the system(s). For large systems, the manual must include as-built drawings. Failure to provide required documentation may delay or disqualify incentive payment.

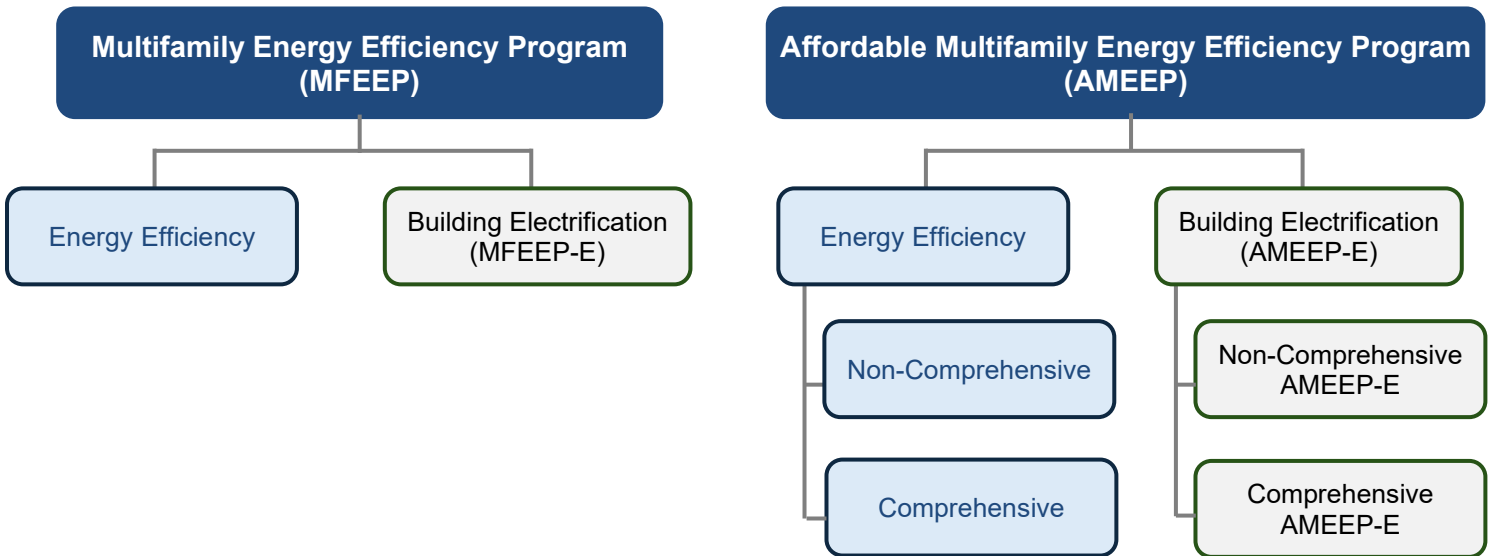
Scope of Work Changes

After a project has been pre-inspected, any changes to the submitted scope of work are subject to review and approval by the applicable Utility, with support from the IC, and must be reflected in all commitment documents. Significant scope changes may require a supplementary inspection or additional documentation. Minor adjustments that do not affect savings, eligibility, or incentives, as determined by the Utility, do not require approval. Changes in specifications or quantities may result in revised incentives.

Any elements beyond the established scope of work that are installed prior to receiving Utility and IC approval will not be eligible for incentives. No scope of work changes can be made after the project has been post-inspected.

5.2. Energy Efficiency Pathway

The energy efficiency pathway provides incentives for weatherization, electric, gas, and secondary savings measure upgrades.



5.2.1. MFEET Energy Efficiency and AMEET Non-Comprehensive Energy Efficiency

The following measures are all eligible for MFEET Energy Efficiency and AMEET Non-Comprehensive Energy Efficiency incentives.

- **Weatherization Measures:** These measures focus on improving the building envelope by reducing the amount of heating and cooling escaping the building. These measures primarily save heating fuels (National Grid natural gas for AMEET only, *Con Edison natural gas, Con Edison district steam or Fuel Oil when the building also has a Con Edison electric account*). Fuel eligibility is subject to verification by the applicable Utility.
 - Attic Cavity Insulation
 - Above Deck Roof Insulation
 - Wall Insulation
 - Window Replacement
 - Air Sealing
- **Electric Measures:** These measures focus on reducing electric consumption.
 - Elevator Drive System Upgrades
 - Variable Frequency Drives
 - Pumps (Booster, Condenser)
 - EC Motors
 - Rooftop Exhaust Fan Motor Replacements
 - HVAC Controls
 - Custom Other (measures not explicitly listed in the NYS Technical Resource Manual or this

Program Manual that are demonstrated to save energy and are pre-approved by the applicable Utility)

- **Gas Measures:** These measures focus on reducing gas consumption only.
 - Energy Management Systems, where the boiler's Remaining Useful Life (RUL) is greater than or equal to seven years
 - Gas Combustion Equipment (AMEEP only), including Boiler Replacements, Instantaneous Water Heating, and Standard Domestic Hot Water Heating (subject to eligibility requirements for hard-to-electrify buildings; see the MFEPP & AMEPP Technical and Inspections Guide
 - Pipe Insulation
 - HVAC Controls
 - Smart Thermostatic Radiator Enclosures
 - Custom Other (measures not explicitly listed in the NYS Technical Resource Manual or this Program Manual that are demonstrated to save energy and are pre-approved by the applicable Utility)
- **Secondary Savings:** Secondary Steam or Oil savings are defined as secondary savings achieved by a measure that reduces electric energy use as well as secondary steam or oil. The Program offers incentives to Energy Efficiency and Weatherization projects that reduce **both** electricity and district steam provided by Con Edison or oil. The limitations noted here apply solely to eligibility for Secondary Steam or Oil incentives and do not affect eligibility for base energy efficiency incentives (e.g., gas equipment eligibility under AMEPP non-comprehensive). To qualify for Secondary Steam or Oil incentives, a project must:
 - Have an eligible Con Edison electric account
 - Have active Con Edison steam service for projects looking to claim secondary steam savings or provide annual oil (Fuel Oil No. 2 and 4 only) usage and proof of purchase for buildings looking to claim oil savings
 - Buildings with interruptible gas service are not eligible.
 - The following measure/project types do not qualify for incentives:
 - Measures that save only Con Edison steam are not eligible for the Program.
 - Projects that include installation of space heating and domestic hot water equipment fueled by gas, steam, or other delivered fuel.

5.2.2. AMEPP Comprehensive Energy Efficiency

The AMEPP comprehensive pathway is for customers who undertake comprehensive retrofits, such as whole-building upgrades that address multiple building system categories. This pathway accepts a wider range of measures than non-comprehensive AMEPP projects, due to the whole-building-upgrade approach of these projects. Incentives are applied using a system of accumulated points and are calculated on a \$/dwelling unit basis. A minimum of 80 points needs to be met to be classified as a comprehensive project. Comprehensive projects are also eligible for an optional mid-project incentive payment and subsidized technical assistance for activities like energy audits and retrofit scope development.

Project Eligibility

Eligible electric and gas measures for a comprehensive project are assigned points per measure that range from 10 to 40. The table below (Table 4) provides the point allocation for each eligible measure. To be eligible as a comprehensive project, a project must meet an 80-point minimum. For detailed minimum installation

requirements, please refer to the Multifamily Energy Efficiency and Electrification Program Technical and Inspections Guide.

Table 4: Comprehensive Pathway Eligible Measures and Points

Measure Name	Points
Wall Insulation	40
Window Replacement	40
Attic Cavity or Above-Deck Roof Insulation	30
Boiler or Furnace Replacement	30
Chiller	30
Ventilation Overhaul	30
Domestic Hot Water Heater Replacement	20
Cooling Tower	20
Elevator Modernization	20
Smart Thermostatic Radiator Enclosure	20
Heat Recovery Ventilators or Energy Recovery Ventilators	20
Building Management System	15
Energy Management System	15
Hydronic Space Heating Pumps	15
Domestic Hot Water Pumps	15

Measure Name	Points
Air Handlers	15
Variable Frequency Drives	15
EC Motors	15
Exhaust Fans	15
Steam Traps	10
Air Sealing Package	10
Orifice Plates	10
Boiler Burner Replacement	10
In-Unit Low Flow Devices	10
Master Venting	10
Thermostatic Radiator Valves	10
Domestic Hot Water Controls	10
Smart Thermostats	10
Equipment Insulation	10
Refrigerators	10

Incentive Structure

The comprehensive pathway offers incentives that are calculated on a per dwelling unit basis, at a rate that depends on a project's accumulated points (as described above) and location. As shown in the table below (Table 5), projects that reach 80-99 points are in Tier A; projects that reach 100-129 points are in Tier B; projects that reach at least 130 points are in Tier C. To calculate the total incentive amount expected from a project, the customer can add up the points from their proposed project, determine which tier level their project is in, and multiply the incentive rate for that tier and the number of dwelling units in the project's building.

Table 5: Comprehensive Pathway Incentive Rates

Tier	Minimum Points	Incentive Rate (\$/Dwelling Unit)	Con Edison Building Adder	5-25 DU Building Adder
A	80	\$750	\$250	\$200
B	100	\$1,500	\$200	\$300
C	130	\$2,000	\$200	\$400

Additional AMEEP Comprehensive Requirements

- **Large projects:** Large projects require pre-approval. Large projects are defined as projects over 500 dwelling units for Con Edison and 150 dwelling units for National Grid. The applicable Utility will review project information and determine potential funding availability based on the project size, scope, cost, and system impacts. Additional requirements, including Measurement & Verification (M&V), may apply. Incentives for large projects may be adjusted in the Utility's sole discretion on a case-by-case basis. Customers considering large projects should contact the IC see [Section 12](#).
- **Campus-Style Projects:** When multiple buildings are on the same site, they may be categorized as campus-style. When there is a campus-style project, the project has the option to apply as a single large project. Buildings that share central equipment across multiple buildings (e.g. shared boiler, shared heating distribution system) are generally treated as campus-style projects and must apply as a single project, subject to Utility determination. Campus-style projects will be reviewed on a case-by-case basis. Please consult the IC for further clarification. Projects may be considered campus-style when:
 1. Buildings are under the same management;
 2. Buildings are on the same, or adjacent, blocks;
 3. Buildings on the site may be similar in typology, age, size and have similar envelope and mechanical systems; and
 4. The site contains a total of 5 more dwelling units across buildings.
- **Point Allocation for Multiple-to-1 or 1-to-Multiple Replacement Measures:** In cases where multiple equipment is replaced by a single equipment or a single equipment is replaced by multiple equipment, points will be awarded based on the number of energy efficiency measures that are fulfilled by the scope of work ("SOW"). Energy efficiency measures are based on the end use application of the proposed and baseline equipment. Multiple equipment that serves a single end-use application will only receive points for the measure once. The proposed equipment specifications must meet or exceed code (ECCCNYS or any other applicable local code).

- Example 1: If a SOW involves replacing a boiler plant that provides space heating and DHW with a more efficient boiler that does not provide DHW and a separate, more efficient DHW heater, that project receives points for both Boiler Replacement (30) and Domestic Hot Water Heater Replacement (20)
- Example 2: If a SOW involves replacing a boiler plant that provides space heating and a chiller plant that provides space cooling with an absorption chiller that provides both more efficient space heating and more efficient space cooling, that project receives points for both Boiler Replacement (30) and Chiller Replacement (30).
- Example 3: If a SOW involves replacing a boiler plant with 5 Boilers to 5 more efficient Boilers or 1 larger, more efficient Boiler will only receive 30 points.
- Projects with multiple-to-1 or 1-to-multiple SOWs will be reviewed on case-by-case basis. Please consult your Utility or IC for further clarification.

Mid-Project Incentive Payment (Con Edison projects only)

Incentives for comprehensive projects are paid when the project is completed. However, the program acknowledges that these projects may take a longer time to complete than non-comprehensive projects. To help assist with upfront investments in equipment and other costs borne by the customer, the customer may request a one-time mid-project incentive payment.

The mid-project incentive is based upon points associated with the scope of work. The customer may request a mid-project incentive payment once measures that make up at least 60% of the points have been installed. The full measure must be installed for that measure's points to count toward 60% of the scope points installed. Con Edison may but is not required to review and approve the request for a mid-project incentive payment and conduct a post-inspection of the installed measures. The mid-project payment must be expressly approved in writing by Con Edison. Once the installed measures pass a post-inspection or cure any deficiencies identified by the post-inspection, Con Edison will pay a mid-project incentive, which is 40% of the total project incentive.

Only one mid-project payment per project shall be allowed. After the mid-project payment is received, the customer must complete the remainder of the project under the comprehensive pathway to receive the remaining comprehensive incentive. If the scope is reduced after the mid-project payment and the sum of the points is less than 80, the project will no longer be eligible for incentives under the comprehensive pathway and will receive adjusted incentives based on the lower non-comprehensive incentives for the completed measures. To the extent that the mid-project payment exceeds the total project incentive for which the project is ultimately eligible, the customer or contractor must return any excess incentive they received to Con Edison. [See Section 5.1](#) for further details regarding scope of work changes.

Mid-Project Incentive Payment Submission Requirements

The Applicant must submit the following completion paperwork to begin the process of a post inspection for the measures that were completed for the mid-project payment:

- Signed Mid-Project Statement of Completion (SOC) outlining measures that are completed
- Final project invoices and/or receipts for scope of work (SOW) that is complete
- Photo documentation for engineering review if completing virtual inspection (see [Section 5.2](#))
- An installation schedule for the measures that comprise the remainder of the scope of work

AMEEP Comprehensive Scope Changes

Customers will not be eligible to receive incentives from the Comprehensive Pathway if the project does not install enough measures to comply with at minimum the Tier A point requirement in effect when the Preliminary Incentive Offer Letter was signed. If a customer reduces the scope of work and the new scope is found to be below the Tier A minimum point requirement, then the project will be directed to the non-comprehensive pathway and incentives will be adjusted to non-comprehensive rates.

If the scope is reduced after the mid-project payment is approved and received, the points achieved must meet the minimum thresholds for Tier A, Tier B, or Tier C for the customer to receive comprehensive incentives for the rest of the measures. That is, the total sum of the points achieved by the measures in the final completed scope of work must be equal to or greater than 80 points for Tier A, greater than or equal to 100 points for Tier B and greater than or equal to 130 points for Tier C to be eligible for incentives through the comprehensive pathway. If the sum of the points is less than 80, the project will not be eligible for incentives under the comprehensive pathway and will receive adjusted incentives based on the lower non-comprehensive incentives for completed measures. In any circumstance, the final incentive payment will be equal to the total completed project incentive minus the mid-project payment. If the total incentive for non-comprehensive is less than the comprehensive mid-project payment, the applicant shall reimburse the Utility or come to an agreement on the difference in incentive.

Technical Assistance

Technical assistance, which includes an energy audit (also known as an energy assessment), is available for projects through NYSERDA's [FlexTech program](#). Energy audits are conducted by approved Energy Service Providers before a project begins and can help customers identify energy efficiency opportunities and determine an initial scope of work and capital planning. The FlexTech program shares the cost to produce an objective, site-specific, and targeted study on how best to implement clean energy and/or energy efficiency technologies

The audits completed by the Energy Service Providers should meet the FlexTech program requirements. Please contact NYSERDA at flextech@nyserda.ny.gov for questions about the FlexTech program and support offered by NYSERDA.

Projects with FlexTech energy audits conducted within the past year may be able to waive the AMEEP Comprehensive pre-inspection requirement if the audit reports contain sufficient detail on existing conditions and if project scopes in the report are aligned. Please refer to [Section 7.1](#) on pre-inspection requirements for the information that the Utilities will expect in the audit reports. Acceptance of audit reports in lieu of pre-inspection is at the sole discretion of the IC and/or applicable Utility.

5.3. Building Electrification Pathway

The Building Electrification pathway for MFEET and AMEEP allows buildings to receive incentives for projects that reduce or entirely remove their reliance on fossil fuels for space heating and/or heating of domestic hot water.

5.3.1. Eligible Measures

MFEET-E and AMEEP-E have the same measure eligibility requirements. The following measures are eligible

to be installed as part of a **Building Electrification** project:

Table 6. MFEEP-E Measures

Former Category	Pathway	Measure Name	Eligible Technologies
2C	Prescriptive (5-100 dwelling units)	Prescriptive Space Heating: Full Building Load Electrification	• Cold Climate Air-to-Air Mini-Split Heat Pumps • Cold Climate Air-to-Air Single Packaged Heat Pumps • Air-to-Air Large Commercial Unitary Heat Pumps (single packaged or split system) • Air Source Variable Refrigerant Flow Heat Pumps • Packaged Terminal Heat Pumps (PTHP)
4	Custom	Custom Space Heating: Full Building Load Electrification	• Space Heating Air Source Heat Pumps Technologies above • Heat Recovery Chillers and Heat Pump Chillers • Heat Pump Dedicated Outdoor Air Systems (HP-DOAS) • Energy Recovery Ventilators (ERVs) • Heat Recovery Ventilators (HRVs)
6	Custom	Custom Domestic Hot Water Electrification ("DHW")	• Heat Pump Water Heaters (HPWH) for domestic/service water heating • Air-to-Water HPWHs for domestic/service water heating
6A	Prescriptive	Prescriptive Domestic Hot Water Electrification ("DHW")	• Full load Air-to-Water HPWHs for domestic/service water heating where hot water serves in-unit use only.
10	Custom	Space Heating: Phased Load Electrification	• Technologies listed above that add new electric heat equipment and permanently reduce fossil fuel or district steam heating but do not meet 100% of the building's heating load

Please note that central ASHPs and ductless or partially ducted mini-split heat pumps must be on the Northeast Energy Efficiency Partnership ("NEEP") Cold Climate Air Source Heat Pump (ccASHP) Product List to be eligible for incentives (https://ashp.neep.org/#!/product_list/). Eligibility is determined by the applicable Utility at the time of application.

Please note the following technology and building system configurations are not eligible: Heat pump systems used for space heating must be designed for either heating-only operations or both heating and cooling operations; **cooling-only systems are not eligible.**

- Window Heat Pump Units
- Ground Source Heat Pumps are eligible through Con Edison's Commercial and Industrial Program, please reach out to commercial@coned.com to learn more.
- Technologies using refrigerants prohibited or scheduled for phase-out under applicable federal, state, or local law at the time of installation

Learn more about the technology specifications here in the [Con Edison Energy Efficiency Program Guidelines Building Electrification](#)

5.3.2. Non-Heat Pump HVAC Replacement – Fuel Switching

Fuel Switching is defined as any measure that replaces existing oil, or natural gas HVAC equipment with

electric systems. Conversions from electric systems to gas, steam, or oil are not eligible. To qualify for Fuel Switching incentives, a project must:

- Have an eligible Con Edison electric account
- Have active Con Edison steam service or provide annual oil (Fuel Oil No. 2 and 4 only) usage and proof of purchase
- Have not received incentives through the Demand Management Program (“DMP”) for the existing steam or natural gas consuming equipment and associated controls, being proposed for electrification.
- Not be in a NWS area.
- Be an existing facility (gut renovations allowed)

Table 7. Fuel Switching Measures

Fuel Switching Measures include but are not limited to:

Existing Equipment	Proposed Replacement Technology
• Steam absorption chiller* • Steam turbine chiller* • Gas-engine-drive chiller • Gas-fired boiler • Steam-driven boiler* • Oil-fired boiler	• Electric chiller • Electric boiler

Measures not eligible for custom fuel switching incentives include:

- Heat pumps, heat pump chillers, heat recovery chillers for space heating/cooling or hot water; please see the MFEED-E measures section for information on heat pump eligibility and incentives
- Electrification of non-HVAC equipment, such as stoves, washers, and dryers
- Conversion to electric resistance heating
- Removal of Cogeneration or Combined Heat and Power (CHP) Plants
- Addition of new Cogeneration or Combined Heat and Power (CHP) Plants
- Replacing steam chillers or steam boilers that use District Steam*

5.3.3. MFEED-E Building Electrification Pathways

Building Electrification projects may proceed under two pathways, based on the technology, building size, and if the equipment covers 100% of the heating loads.

Prescriptive Savings Approach

A building is eligible to proceed under the **Prescriptive Approach** if:

- The building contains between 5 and 100 dwelling units
- The entire space heating or domestic hot water needs of a building are being electrified, with verifiable decommissioning of all existing fossil fuel systems
- For domestic hot water heating only the HPWH may only serve in-unit spaces

Prescriptive projects may not combine their project with a custom project. For example, a prescriptive project which relied on a central ASHP system could not also seek custom incentives for installation of a complementary ERV/HRV. The project scope would then qualify the project to go custom.

Custom Savings Approach

A project is eligible to apply for incentives under the custom incentive rates if they don't fall under the prescriptive categories. In these cases, contractors must follow the application process requirements outlined in Section 6 of this Program Manual.

Phased Heating Electrification

All buildings pursuing Building Electrification incentives are encouraged to fully electrify the building. Projects that do not achieve full BE are treated as Phased if they add new electric heating equipment and permanently reduce fossil fuel or district steam heating. Projects that do not electrify an entire building will be treated as Phased if they meet the following two conditions:

- Include new equipment that uses electricity and one or more of the following sources of heat: geothermal heat exchanger, air-source heat pump, or recovered waste heat.
- Permanently reduce fossil fuel or district steam use for space, water, or process heating.

5.3.4. AMEEP-E Building Electrification Requirements and Incentive Structure

AMEEP-E offers incentives for affordable multifamily buildings interested in electrification of heating and domestic hot water systems. AMEEP-E may prioritize buildings that use fuel oil for heating.

Like the AMEEP energy efficiency offering, AMEEP-E offers incentives for non-comprehensive and comprehensive projects. Buildings that only undertake electrification upgrades are considered non-comprehensive. Buildings that undertake electrification upgrades plus additional energy efficiency upgrades are considered comprehensive. To be a comprehensive project, the energy efficiency scope must meet 50 points, as detailed below.

To encourage building weatherization, all buildings going through AMEEP-E must install attic cavity insulation if none currently exists, unless otherwise approved by the applicable Utility.

AMEEP-E Non-Comprehensive	AMEEP-E Comprehensive
Space and/or water heating electrification upgrade (+attic insulation if none currently exists)	Space and/or water heating electrification upgrade + 50 points in energy efficiency measure upgrades. Attic insulation must be included if none currently exists

5.3.4.1. Additional AMEEP-E Requirements

To be eligible for AMEEP-E buildings must be a regulated affordable housing building or an HDFC co-op, rent roll without an affordable housing agreement will not be accepted for AMEEP-E. AMEEP-E projects must meet the following requirements:

- Building Requirements:
 - Must use oil for heating
- Scope Requirements:
 - Attic cavity insulation is required if none currently exists
 - Projects cannot be common area only
 - Incentives are capped at 85% of project cost
- Affordability Requirements:
 - Buildings cannot shift the cost of heating to tenants
 - Con Edison will inform the relevant housing agency (HPD or HCR) that the building is being electrified so that heating payment regulations will be enforced
 - Buildings must demonstrate that building operating costs will not increase after installation of electrification project as determined by Con Edison based on submitted documentation
 - Building will need to provide oil heating bills prior to commitment as part of the eligibility screening so that Con Edison can conduct an operating expense analysis

5.3.5. Service Adequacy Requirements

All MFEED-E and AMEEP-E building electrification projects need to be considered service adequate by Con Edison Energy Services before any incentive payment will be released. A Master Case ID ("MCID") will be issued for each project submitted for this review.

For more information on the Service Adequacy process, please refer to the [Con Edison Blue Book](#) on the Con Edison's Energy Services Resource website. You will be asked to share your MCID to track your service adequacy requests.

To receive a Preliminary Incentive Offer Letter ("PIOL"), your project MCID and a preliminary service adequacy determination must be submitted. If the initial determination finds the service to be inadequate, any required service upgrades must be completed. The project will then need to pass a final inspection by Con Edison's Energy Services department before it can be energized, and payment is released. MCIDs must remain active during the duration of the project lifecycle. It is the responsibility of the Participating Contractor to work with the associated Electrician to ensure the MCID is active.

6. Project Application and Review Requirements

This section of the Program Manual outlines how projects should be submitted and how the Programs review and approve projects to be eligible for incentive payment. The companion MFEED and AMEEP Technical and Inspections Guide provides technical details related to requirements for specific eligible equipment, custom application submissions, and measure-level documentation and inspection guidelines, and is incorporated by reference subject to this Program Manual. Project types and program tracks may have different application requirements, making it essential to identify the correct categories for each project. The definitions of these differences are the following:

Program Tracks

- **Energy Efficiency:** electric and gas measures, weatherization, and secondary savings
- **Building Electrification:** electrification of space heating and/or hot water

Project Types

- **Prescriptive Pathway** describes projects that install measures listed in the [New York State Technical Resource Manual \(TRM\)](#) and have set incentive rates from the Utilities.
- **Custom Pathway** allows projects to install measures that are not listed in the TRM or are a TRM measure with a calculation method that differs from the TRM. These are often unique and complex technologies or processes. A detailed custom calculation is usually required to calculate energy savings prior to installation, and incentives are offered based on the site-specific expected energy savings and costs.

6.1. Project Process

1. CHECK PROJECT AND EQUIPMENT ELIGIBILITY

Prior to applying to the Program, the Customers and PCs must verify that:

- All installed equipment must meet or exceed specifications described in the Program Manual and Technical and Inspections Guide.
- The customer must consent to proceed with the project, and construction or demolition may not begin until a(NTP) is issued.

2. CHECK ACCOUNT ELIGIBILITY

The electric and/or gas service account must be eligible for Con Edison and National Grid incentives. This can be confirmed by requesting account assignment via the IC's online portal. To request account assignment, the customer or PC must prepare a Program Application signed by both parties and submit it via the IC's Online Portal. The accounts requested for assignment must correspond with the building address and energy savings to be generated (electric or gas). The IC will review the initial project details and account status for eligibility. Projects may be determined ineligible at this stage, in the applicable Utility's discretion, including but not limited to the following circumstances:

- The measure has previously been installed and incentivized at the address.
- The account number(s) provided do not correspond with the address or have low or no electric and/or gas usage within the past year.
- The account, project, or building type does not meet program eligibility requirements described in Section 4.

Occasionally, an account requested for assignment will require further manual review due to a recent ownership change, oil-to-gas conversion, or other special circumstances that complicate account history. The applicant will be informed if this is needed, and a recent bill may be requested to support the review. Additional project specific eligibility requirements: An active Con Edison electric account is required for electrification projects, electric energy efficiency projects, and secondary savings projects. An active Con Edison or National Grid gas account is required for gas energy efficiency. An active Con Edison or National Grid gas account or

Con Edison electric account is required for weatherization incentives. Account requirements may differ by Utility, measure type, and project pathway, and are subject to verification and approval by the applicable Utility.

3. SUBMIT AN APPLICATION PACKAGE

An application package must be submitted to the IC, primarily through the IC's Online Portal, unless otherwise directed by the Utilities or the IC. In limited circumstances:

- Con Edison customers may submit applications via email to ConEdMultifamily@willdan.com
- National Grid customers may submit applications via email to NationalGridLMI@willdan.com

Table 10: Application Package Requirements

Requirement	All Projects	Energy Efficiency Custom	Building Electrification	AMEEP Comprehensive
Program Application	Required	Required	Required	Required
W-9	Required	Required	Required	Required
Cut Sheets	Required	Required	Required	Required
Affordable Housing Documentation	AMEEP only	AMEEP only	AMEEP only	Required
Supplemental Documents	As needed	As needed	As needed	As needed
Statement of Work	—	Required	Required if custom scope	—
Custom Energy Savings Calculations	—	Required	Required if custom scope	—
Cost Estimate for Proposed Work	—	Required	Required if custom scope	Required
Design Drawings	—	If applicable	Required	—
Load Calculations	—	If applicable	Required (with exceptions)	—
MCID	If applicable	If applicable	Required	If applicable
Comprehensive Excel Tool	—	—	—	Required
Building Electrification Space Heat Calculator	—	—	Required if custom scope	—

“—” indicates that the document is not required for that project type unless otherwise requested by the applicable Utility or IC. All documentation requirements are subject to Utility review and approval.

- **Program Application:** The applicant's name and account number must match the applicable Utility account holder for the building address, unless otherwise approved by the Utility. All sections must be filled out and signed as directed.
- **W-9s:** (incentive recipient and where applicable, utility account holder). Form W-9 must be latest version available on IRS website and must match the payee indicated on the Program Application. The Form W-9 must be signed and dated in the current year. National Grid customers must provide the utility account holder W-9 in addition to the payee indicated on the Program Application.
- **Cut sheets** (product specification data sheets) are required for all measures included in the project scope. Specific model(s) of the measure being used in the project must be highlighted on the cut

sheets before submission. Electrification projects must also include the following equipment specification sheets:

- **NEEP Cold Climate Air Source Heat Pump List product information sheet**, if equipment is NEEP-listed. For NEEP-listed equipment, the heating capacity shall be based on the equipment's NEEP certificate maximum heating capacity values, while the cooling capacity shall be based on the equipment's NEEP certificate minimum cooling capacity values. Project applications shall include the NEEP specification sheet with the corresponding version number of the NEEP equipment requirements, as applicable at the time of installation.
- **AHRI certificate**, where the product is not NEEP-listed.
- **Manufacturer engineering documentation**, where the product is not NEEP-listed.
- Manufacturer-developed software that can assign equipment capacity at entered design heating and cooling temperature, in accordance with ACCA Manual S, Standard 183, or other code-approved equivalent computational procedure.

Final equipment eligibility is determined by the applicable Utility based on the documentation submitted.

- **Affordable Housing Documentation (for AMEEP projects only):** See **Table 3** for the list of accepted documentation
- **Supplemental Documents:** Any other measure-specific documentation (e.g. satellite images to validate square footage) listed in the **MFEED & AMEEP Technical and Inspections Guide**, in guidance documents specific to the technology, or requested to confirm savings calculations.
- **Statement of Work.** A detailed description of the intended project, including existing and proposed equipment, estimated energy savings impact, and any additional assumptions.
- **Custom Energy Savings Calculations.** Many custom measures have an existing savings calculations tool in Excel format that may be submitted to meet this requirement or can be directly input into the IC's project management portal. The following lists the measures that are custom and have available templates and upload formats:
 - Via direct input into IC's project management portal: Custom Energy Management Systems (EMS); EC Motor Replacements; VFD Controls
 - Via Excel tool: Building Management Systems (BMS); Boiler and DHW Controls; Chiller Replacements; Cooling Towers; Custom/Non-Linear Pipe Insulation; Pump Replacements; Smart TREs; Ventilation Overhaul

For Custom Other measures and measures without existing energy savings calculation tools, the submission should provide evidence for calculations, including but not limited to assumptions for calculations and/or any metering conducted for baseline energy usage. Please reference the below [Section 7.4 Building Energy Modeling Requirements](#) and [Section 7.5 for Baseline Guidance](#) for more requirements to assist in custom energy savings calculation submission. In addition to the modeling requirements, all Custom Other measures will require a custom report to accompany the submission, which at the minimum must include: project address; units; vintage; detailed description of scope of work, including existing conditions, proposed upgrades and conditions; modeling calculation assumptions; and any other information relevant to the scope and savings methodology proposed.

- **Cost Estimate for Proposed Work** Applicants shall submit a cost estimate for the proposed work with its initial application. Eligible project costs can be found in Table 13.
- **MCID** All projects (except PTHP projects where existing heating was provided from electric resistance) require the building to be ruled "service adequate". A MCID is required prior to project commitment and

may be collected during the application review to expedite review. See more on the process in [Section 5.3.5](#).

- **Building Electrification Space Heating Calculator**, The Building Electrification Space Heating Calculator is an Excel-based tool that has been developed to assist PCs applying to the Program with calculating energy savings and incentives for various types of heat pump technologies. The Calculator should be used as the default method to calculate energy savings for the custom categories (4, 4a, and 10). Applicants may bypass using this calculator, opting instead to calculate savings using their own custom bin analysis or energy modeling approach. All calculations must be clear and transparent, utilizing standard engineering methodologies, including a listing of source values. Find out more about load calculations requirements and load calculation methods in [Section 3.3](#) in the [Con Edison Energy Efficiency Program Guidelines: Building Electrification](#). Use of alternative calculation methods is subject to review and approval by the applicable Utility.
- **Design Drawings** Applicants must submit project design drawings at the request of Con Edison.
- **Comprehensive Tool Excel** template, which will be provided by Willdan. This will ask for building information, scope of work, and estimates for initial savings, cost, and timeline.

4. PRE-INSPECTION

Once all application materials are submitted and the project has been deemed eligible for the program:

All Projects:

- The Utilities and/or the IC will pre-inspect the existing condition of your site. To be eligible for incentives, work may not begin until this pre-inspection has been completed and the IC has sent a NTP.
- The IC's inspector will reach out to the Participating Contractor via email within five days of a project reaching the "Sold" stage in the IC's Online Portal. The inspector will request the site's availability for an inspection and outline required building access based on the measure type (e.g. boiler room, roof, apartment units, common areas). Pre-inspections must be scheduled promptly; if inspections are repeatedly delayed or re-scheduled, the project will be at risk of cancellation.
- Projects that have flags or fails from the pre-inspection must cure those flags or fails within **10 days** of the inspection findings being uploaded to the IC's Online Portal. If ongoing performance in curing pre-inspections is poor, the project may be at risk of cancellation, or the contractor may be at risk of restriction from participating in the Programs.

Comprehensive Projects:

- AMEEP and AMEEP-E Comprehensive projects will receive a PIOL after the project is deemed eligible for the program and before a pre-inspection. A PIOL is provided earlier for comprehensive projects in case this documentation is needed to secure project financing. The PIOL must be signed by the customer and returned to the IC within 30 days. Issuance of a PIOL does not guarantee final incentive approval.
- After the signed PIOL is returned to the IC, customers will have 90 days to take the necessary action with the IC to receive the Notice to Proceed. This includes scheduling project pre-inspection, curing any flags or fails, and submitting final savings calculations and cut sheets
- Like custom projects, comprehensive projects will require an initial engineering review. Contractors must provide any additional information requested during the engineering review and work with the IC so that the engineering review is completed before the 90-day period mentioned above.

5. INITIAL ENGINEERING REVIEW

For projects submitted under the Custom Pathway, an initial engineering review will be conducted by the IC and/or the Utilities to verify results of the pre-inspection and evaluate submitted savings calculations. Projects of a certain size will be subject to additional review by the Utility. Contractors must provide any additional information requested during the engineering review.

6. PRELIMINARY INCENTIVE OFFER LETTER AND NOTICE TO PROCEED

After the pre-inspection and/or initial engineering review, your project will be reviewed, and permission to begin installation will be provided.

All Projects will receive an NTP stating estimated project savings and incentives, which are non-binding and subject to change based on final inspection and review. Installation may begin when the NTP is issued.

Custom Pathway and all Building Electrification Projects: Projects will first receive a **Preliminary Incentive Offer Letter (PIOL)** confirming the estimated project savings and incentives that must be signed by the Customer and Participating Contractor and returned to the IC. Following acceptance of the signed PIOL, the NTP will be issued, and installation may begin. To receive a PIOL for Building Electrification projects, all projects must receive a service determination on the existing electric service from Con Edison. Refer to [Section 5.3.5](#) for more information on the service adequacy process for electrification projects.

AMEEP/AMEEP-E Comprehensive Projects: A PIOL will be provided after a project is deemed eligible for the program, as stated in the section above. An NTP will be issued after the engineering review and will confirm estimated project savings and incentives.

7. INSTALL EQUIPMENT

Project installation completion is defined by the full installation and commissioning of the scope of work or any scope required to ensure the proposed improvements are operational and will realize energy savings. Projects must adhere to the install deadlines described in Section 3. The project's scope of work includes all line items submitted to the IC's Online Portal.

If there are any scope changes or extensions needed, please notify the IC and/or the Utilities immediately. The Program must be notified in writing to approve the extension or the scope of work change. Extensions may be granted at the discretion of the applicable Utilities, with administrative support from the IC. Scope changes may result in revised total incentives. Any reduction in scope observed at post-inspection will result in the uninstalled line items being removed from the project.

AMEEP Comprehensive Projects: Mid-Project Incentive Payment (Optional)

For AMEEP Comprehensive projects only, the customer may request a mid-project incentive payment once measures that make up at least 60% of the points have been installed. A project will be eligible for only one mid-project incentive payment. The Applicant must submit the following completion paperwork to begin the process of a post inspection for the measures that were completed for the mid-project payment:

- Signed Mid-Project Statement of Completion (SOC) outlining measures that are completed

- Final project invoices and/or receipts for SOW that is complete
- Photo documentation for engineering review if completing virtual inspection (see [Section 5.2](#))
- An installation schedule for the measures that comprise the remainder of the scope of work

8. SUBMIT COMPLETION PAPERWORK

Completion paperwork should be submitted as soon as the project is completed. **Completion paperwork should only be submitted after 100% of measures included in the NTP are fully installed on-site.** All projects must provide completion paperwork, which includes:

- **Statement of Completion:** Confirms that the full project scope was installed and completed. Must be signed by the Customer and Participating Contractor. Only costs directly related to incentivized measures should be included on the completion form.
- **Final Invoice:** A copy of the final itemized invoice prepared by the Participating Contractor or installer for the customer, broken out by product/materials and labor and including all costs directly related to incentivized measures. *Required for Custom, AMEEP Comprehensive, Building Electrification, and Weatherization projects; Prescriptive Energy Efficiency project invoices must be made available upon request.* See the "[Project Costs and Invoicing Requirements](#)" section of this manual for invoicing requirements.

All Building Electrification projects must also include:

- **Decommissioning checklist:** For all full-load electrification projects, a Non-Residential Decommissioning Checklist will need to be filled out by the Participating Contractor prior to the "Completion" of the project in the IC's project management portal. This checklist is [available here](#). All decommissioning projects must follow safe decommissioning practices as outlined in the Program requirements, decommissioning checklist, relevant codes, and standards. Decommissioning must be overseen by a licensed plumber.

9. POST-INSPECTION

- The Utilities and/or Willdan will inspect the new condition of the site to determine if installed measures meet program requirements.
- Projects that have flags or fails from the post-inspection must cure those flags or fails within **10 calendar days** of the inspection findings being uploaded to the IC's Online Portal.
 - AMEEP Comprehensive projects must cure flags or fails within 30 days of the inspection findings being uploaded to the IC's Online Portal. If a measure is not fully cured within 30 days of notification, that measure will be removed from the project scope and the project's total points will be lowered accordingly. If a project's total points fall from Tier B to Tier A, the incentive will be offered at Tier A rates. If the project falls out of Tier A, the Utilities will offer a reduced incentive after reviewing the project scope and energy savings.

10. RECEIVE INCENTIVE PAYMENT

- Once the post-inspection is fully cured and energy savings and incentives are finalized, an incentive check will be mailed to the payee identified on the Program Application.
- Incentives are paid based on the final calculated savings and scope observed at the post-inspection stage. Incentives cannot exceed the customer's project cost for eligible measure(s) listed in the

Program Manual. Material and Labor costs must be divided on submitted invoices and are subject to Utility review. Project costs may be capped for incentive calculations at the Utilities' discretion. See additional invoicing requirements in the Project Costs and Invoicing Requirements section of this manual.

- To receive incentive payments, the Form W-9 submitted on file must match the name of the payee as indicated on the Program application. PCs who are in good standing and not on probation with the Program will be allowed to accept incentive payments on behalf of the customer with prior written approval, in the form of a signed Owner's Agreement indicating the Participating Contractor as the desired payee.
- Incentive payments are issued by check or electronic transfer from the Implementation Contractor. Incentives will only be issued upon project completion and approval from the IC and Utilities.
 - Incentives below \$25,000 are eligible to receive payment via mailed check or electronic transfer. For mailed checks, the full mailing address must be indicated clearly on the W-9 Form and in the IC's Online Portal.
 - Incentives above \$25,000 are eligible to receive payment via electronic transfer only. The payee must submit a void check or bank letter and signed Electronic Fund Transfer ("EFT") Form. For security purposes, the IC may contact the payee directly to confirm account information. Paper checks for incentives above \$25,000 can be requested on a case-by-case basis.
- Incentives are disbursed by the IC approximately 30 days after the project stage in the IC's Online Portal transitions to "Invoice Sent". Contractors may review invoicing and incentive details on the IC's Online Portal.
- **Tax Liability:** Incentives may be taxable for most taxpayers. If the incentive is more than \$600, it will be reported to the IRS and the payee will be provided with an IRS Form 1099, unless the payee has submitted documentation that they are a tax-exempt entity as defined by the IRS. Con Edison is not responsible for any tax liability that may be imposed on any payee because of the payment of the Program incentives. All payees must supply their Federal Tax Identification number to the Utilities to receive the Program incentive. Please consult with your tax professional for information on the tax treatment of the incentives.

7. Installation Quality, Inspections and Technical Reviews

To maintain the integrity and effectiveness of the Program, projects may undergo quality assurance or measurement and verification processes. These reviews help ensure that projects are implemented as intended, deliver expected outcomes, and align with Program standards. By participating in the Program, Customers and Contractors agree to comply with these processes if selected, in the discretion of the applicable Utility. This section also reviews requirements for specific custom scenarios and provides baseline condition guidance.

7.1. Inspection Requirements

Pre-inspections and post-inspections are required for all projects. Pre- and post-inspections can take place in the following formats, depending on the measure or project type:

Table 11: Pre- and Post-Inspection Formats

Inspection Format	Description
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On-Site	Coordinated in-person meeting between Contractors, property managers and Inspector to view the existing conditions (during pre-inspection) or final conditions (during post-inspection).
Desk Review	Time-stamped pictures and/or video recordings that clearly capture existing conditions and equipment to be replaced (for pre-inspections) or the new energy efficient equipment (for post-inspections).

The Utilities and/or their IC must be provided with reasonable access to the site address for pre- and post-inspection of installed energy-efficient measures, including in-unit access for applicable measures. To maintain incentive eligibility, pre-inspections must be completed and cured before starting any installations, and a NTP must be issued. Post-inspections are conducted only after project scopes are completely installed. Additionally, the Utilities reserve the option to request coordination of a site visit at any point in the project's installation lifecycle.

The Utilities and/or their IC's use the following distinctions for inspection results:

- A measure may **"PASS"** the inspection if there are no errors or inconsistencies found on site.
- A measure may be **"FLAGGED"** when there are issues that do not impact savings but prevent a project from moving forward without addressing of those concerns. Projects may be **"CURED"** to rectify the issues. This may include nameplates that are non-consistent with proposed scopes or site conditions that need to be repaired prior to equipment installation or operation on site.
- A measure may be **"FAILED"** if there are larger issues that impact savings or cause a secondary eligibility review. Most projects that fail, can be **"CURED"** however some may need to be cancelled. Please note that as of March 2026, Building Electrification projects can only be "Passed" or "Failed".

PCs must respond in a time-sensitive manner to all inspection-related requests, including scheduling site access for inspectors and remedying all identified issues if the inspection is flagged or failed. The Utilities, with administrative support from the IC, reserve the right to cancel projects due to non-responsiveness.

7.2. Measurement & Verification

Measurement and Verification ("M&V") may be required for projects in which a project or measure has a high degree of savings uncertainty, is an unknown or unique application, or is comprised of a complex group of measures. M&V may also be conducted on specific measures in the interest of improving Program offerings.

The overall intent of M&V is to mitigate risk to the Program by reporting more accurate savings through metering and data collection. It involves a more robust approach to assessing the energy conservation measure and its application. Projects selected for M&V will utilize various methods to obtain insights into energy conservation measures (ECMs) and assess their application as well as their impact on savings. Calculation methodology of final savings may differ from the applicant provided savings due to the additional verification processes. Final savings determinations made through the M&V process are binding for incentive calculation purposes.

If a project has been selected for M&V, the Utilities will provide an initial M&V Plan that must be reviewed, signed, and returned to the IC in accordance with instructions provided by the Utilities, typically concurrent with the PIOL. This is to ensure that all parties understand the methodology for savings calculations and intended

steps for the M&V process. The M&V plan may be revised as additional information comes to light in subsequent project phases, and any revised M&V plans must also be reviewed and signed. It is in the best interest of Customers and PCs to review the documents thoroughly to ensure smooth execution of this process.

The standard M&V process entails a minimum of three different reviews that take place after project submission and throughout a project’s lifecycle including:

- **M&V Plan**, which is shared during the initial project review stage. This outlines the steps necessary to perform M&V on a project and includes a timeline for all milestones, additional requirements from the PC or customer, the equipment necessary to acquire all data, a contingency plan if data is incorrect or unavailable, and other project specific material.
- **Pre-Installation Site Visit and M&V Report:** Once the M&V Plan is signed, Utilities will conduct a Pre-Installation Site Visit to verify the existing conditions of the site, conduct interviews with site personnel on equipment and schedules, and determine what metering or measuring equipment will be necessary to capture all relevant energy data. In cases where logging and metering equipment has been deployed to determine the project baseline, a second site visit at the end of the baseline measuring period may be needed to remove the equipment. To adequately verify baseline conditions, **project construction must not begin until after the associated M&V pre-installation site visit and data collection are completed.** A Pre-Installation M&V Report will be issued to summarize all findings.
- **Post-Installation Site Visit and Final M&V Report:** Once the proposed equipment is installed, Utilities and/or the IC will perform a post-installation site visit to verify equipment installation, ensure all phases of the project are complete and active, and collect any energy use data for the site. In certain cases, logging and metering equipment may be deployed to capture the post-installation energy use data. If metering is deployed, a second site visit will be performed at the end of the post-installation measuring period to remove the metering equipment. A Final M&V Report will be issued to summarize all findings and confirm energy savings.

Additional reviews may be required depending on project phasing, installation timelines, or other measure- or install- specific items that may occur during the review or install period. For projects that include multiple measures, a pause on installing subsequent measures may be required if one is selected for M&V. Utilities will allow for scope or timeline adjustment for projects selected by M&V but incentive payments will not be issued until reviews have been completed. The Utilities may also allow for scope or timeline adjustments on projects selected for M&V, including partial incentive amounts to be paid as the project completes agreed-upon phases subject to successful completion of agreed-upon milestones.

The International Performance Measurement and Verification Protocol (“IPMVP”) provides options for assessment of M&V projects, which will be determined in the M&V Plan:

Table 12. M&V IPMVP Options

IPMVP Options	Description
Option A, Retrofit-Isolation: Key Parameter Measurement	Direct metering of a <u>single</u> key parameter that defines the energy consumption in both baseline (pre-install) and proposed (post-install) cases.
Option B, Retrofit-Isolation: All Parameter Measurement	Direct metering of <u>multiple</u> parameters that define the energy consumption in both baseline (pre-install) and proposed (post-install) cases.

Option C, Whole Facility	Utility level measurement of whole facility consumption and demand. Typically requires 1 year of post-installation utility meter data after ECM is installed.
Option D, Calibrated Simulation	Simulation of energy consumption and demand with utility billing data. Requires 1 year of post-installation utility meter data after ECM is installed

7.3. Quality Assurance and Quality Control (QAQC)

Projects going through the Program may be selected for QAQC activities, such as a secondary inspection or an additional engineering review. The goal of QAQC is to protect the Program from fraud and provide actionable insights for program consistency and efficiency. QAQC is performed by a third-party contractor on behalf of the Utilities.

Projects may be selected at random, or based on other criteria including size, energy savings or incentives. By participating in the program, the PC and customer are expected to fully cooperate with any effort by the Utility or its contractors and subcontractors to make follow-up visits to customer facilities, provide supporting documentation, and respond to other requests in support of this effort. Failure to comply with QAQC activities may result in forfeiture or recovery of the incentive.

The IC and/or Utilities will inform the PC as soon as possible if a project is selected for QAQC. Examples of QAQC activities can include the following:

- **Secondary Pre-Inspection:** A secondary pre-inspection verifies through a third-party effort that existing conditions are consistent with the Program application, adhere to Program guidelines, ensures that no work has been completed, and validates the findings of initial pre-inspection activities completed during the project enrollment process. Additional data points may be collected depending on the proposed measure(s).
 - Project selections for secondary pre-inspections are made prior to issuance of a PIOL or NTP, and if selected, the QAQC activity must be completed before an NTP is issued. Installation may not begin until the NTP is issued.
- **Initial Technical Review (ITR):** An ITR verifies the full application package and pre-inspection findings and confirms energy savings calculations and proposed incentives are accurate.
 - Project selections for ITR are made prior to issuance of a PIOL or NTP, and if selected, the QAQC activity must be complete before the NTP is granted. Installation may not begin until the NTP is issued.
- **Secondary Post-Inspection:** A secondary post-inspection verifies all work was installed in accordance with the proposed scope of work and all installation procedures adhere to program guidelines. Additional data points may be collected depending on the installed measure(s).
 - Project finalization and incentive payment will only proceed after the secondary post-inspection is complete.
- **Final Technical Review (FTR):** An FTR verifies the full application package and inspection findings and confirms energy savings calculations and proposed incentives are accurate.
 - Project finalization and incentive payment will only proceed after the FTR is complete.

Additionally, PCs may be subject to utility-specific reviews and/or assessments to verify Program measure implementation and acquisition.

Please note that all discrepancies found from a QAQC activity must be resolved. Projects that have unresolved QAQC discrepancies will have incentives withheld until the project is cured to full compliance. The Utilities reserve the right to update QAQC protocols at any point of the program year.

7.4. Energy Savings Calculations and Modeling Requirements

Custom energy efficiency and electrification projects may be submitted with a complex energy model outlining the baseline and proposed cases. Whole-building energy models can be accepted from specific modeling programs or via Excel and must follow the specifications and methods described in this section.

Acceptable whole-building energy modelling software programs include: EA-Quip, eQUEST, EnergyPlus, Hourly Analysis Program (HAP), Trane TRACE 700, Trane TRACE 3D Plus, TREAT (Multifamily Edition), or OpenStudio. An Excel-based energy model can be accepted if it follows the following calculation methodologies: 8760 hour-by-hour analysis or Temperature Bin weather analysis. Prescriptive calculations from the NYS TRM will only be accepted if the interactive effects between proposed measures are well accounted for and deemed acceptable by the applicable Utility, with support from the IC. PCs who wish to provide an alternative modeling software should contact the IC for prior approval to ensure proper project review.

The following documents should be provided for reviewing energy models: inputs, outputs, and run files.

The following information must be provided for the baseline and proposed design:

- Monthly energy end-use summary
- Overall annual building energy consumption including all fuels and meters
- Energy cost summary
- Information on hours when space/system loads are not met
- System design parameters report including HVAC, DHW, Envelope, Lighting Plug Loads, Areas, and Spaces

The following should be used as a general approach to creating a whole-building energy model:

- Inputs of pre- and post-retrofit simulations must be the same for all components unless the component is specifically addressed by proposed measures.
- For modeling the energy reduction measure, the operating condition assumptions used in the model must match those in the existing building conditions, unless a change in operating conditions is specifically included as part of the measure.
- The difference between the annual modeled use and the actual consumption for heating, cooling, and base load must differ by no more than -10% to 0%. Acceptability of model calibration will be determined by the applicable Utility. Among other things, the model should not show more energy consumption than the building's energy bills.
- Energy use from systems, equipment, or controls not directly supported by the project's modeling software should be calculated outside the simulation model. External calculations may not replace functions already supported by the software but may be used to inform inputs or adjust results. All external calculation methods must be fully documented, and original spreadsheets must be included in the submittal for Program review.

Acceptance of any modeling software or methodology is subject to review and approval by the applicable Utility.

7.5. Baseline Guidance

The standard method for determining baseline conditions is to reference the applicable local energy code, and energy savings are generated based on exceeding code compliance. Eligible Affordable buildings are allowed to claim existing conditions of the building's current equipment and systems as the project's baseline conditions. Affordable buildings must submit documentation such as boiler name plate and/or specification sheets. If the customer is unable to provide this information, then an alternative option is to provide the age of the equipment (e.g.: equipment vintage to the building) and the IC, on behalf of the applicable Utility, will apply the energy code in effect at time of equipment installation. If the customer cannot submit information for either option, then the ICs will resort to the current energy code to determine the baseline.

Acceptable proof of existing efficiencies include:

1. Combustion Test Record – combustion efficiency will be accepted for measures that require thermal efficiency in the savings calculation; this will require a NYC DOB/DEP official record dated within the last two years
2. Nameplate Efficiency with Degradation – maintenance records required for a minimum of three years.
3. Nameplate to include a picture of nameplate with efficiency or a submittal/email from the manufacturer stating the efficiency
4. NYC ECC – if legacy data is unavailable the year of the make/model and/or installation can be used to determine the minimal code compliant value from that year to use as the baseline

For projects undertaking a custom review or requiring measurement & verification ("M&V"), the most accurate data source identified will be used. In any case that nameplate efficiency or combustion efficiency cannot be verified, code will be used as the baseline.

Additional savings calculations must be submitted with the application package if, for example, the applicant is looking to apply degradation factors, modify operating hours or equivalent full load hours (EFLH). If the applicant can provide annual professional maintenance information on the equipment, a degradation factor as outlined below should be followed. The degradation factor cutoff will be 10%.

$$EFF_{\text{baseline, degraded}} = (EFF_{\text{baseline}}) \times (1-M)^{\text{age}}$$

Where *age* is the equipment age, in years. *M* = 1% degradation for AC units and 0.5% for heating equipment.

Source: NREL: Building America Performance Analysis Procedures for Existing Homes –

Link: <https://www.nrel.gov/docs/fy06osti/38238.pdf>

Application of degradation factors is subject to review and approval by the applicable Utility.

8. Project Costs and Invoicing Requirements

Final invoices are required for all projects with Building Electrification measures, Weatherization measures, or projects utilizing custom calculations. Final invoices are not required for project closeout on other projects that use the New York State Technical Resource Manual to calculate energy savings. However, invoices may be

requested at the discretion of the applicable Utility, with administrative support from the IC, and must be made available upon request.

8.1. Acceptable Documentation for Project Costs

Invoices, AIA documents or progress payments are acceptable documentation for reporting project costs provided they include sufficient details such as itemized costs. See [Section 8.2](#) on general invoice requirements, eligible costs, and notes on AIA documents.

Contracts, budget estimates, purchase orders, job orders, and cost proposals are not accepted as substitutes for an invoice or progress payment. These documents do not serve as proof of paid installation costs. However, such documents can be used to support an invoice or progress payment that lacks sufficient detail – such as missing scope of work or project location – if the invoice can be clearly and directly mapped back to the original contract, estimate, or proposal, subject to Utility review and approval.

8.2. Invoicing Requirements

Project costs submitted to the program are subject to the Utilities' review and may be capped for incentive calculations at the Utilities' sole discretion.

General Requirements and Guidelines for Invoice Submissions

- Include the invoice date.
- Clearly reference the project, including the project address, and ensure all items correspond to the approved scope of work. Any scope changes must be submitted for review and approval by the applicable Utility, with support from the IC.
- Each line item must include a brief description. For example, include the equipment tag for an air handler as "AHU 13B", quantity and/or make and model number.
- To be considered eligible, costs associated with projects must directly contribute to the physical implementation, installation, testing and/or commissioning of the submitted project.
- Include only eligible costs, meaning those that directly support the physical implementation, installation, testing, or commissioning of the submitted project.
- Ensure the final version matches the invoice provided to the customer and aligns with the Statement of Completion. If the amounts differ, clearly explain the reason (e.g., if the customer version includes Program ineligible costs).

For custom projects that are part of a larger overall job, submit invoice(s) that isolate and clearly identify the specific project description and elements, and costs that apply to the program.

Table 13: Eligible Project Costs

Eligible Costs	Description
Startup Testing and Commissioning	Costs directly related to the initial testing and commissioning of equipment or systems to ensure they are functioning correctly and meet project specifications are eligible. This includes activities necessary to bring the system online and confirm operational readiness.
Mobilization	Costs incurred to prepare and transport labor, equipment, and materials to the project site are eligible. This may include site setup, temporary facilities, and

	initial deployment efforts necessary to begin work.
Equipment	Expenses related to the purchase or rental of equipment specifically required for the execution of the project are eligible, provided the equipment is used directly in support of the approved scope of work.
Material	Costs for materials that are installed or consumed as part of the project scope are eligible. This includes items permanently incorporated into the project or necessary for its completion.
Labor	Direct labor costs for personnel performing work within the approved scope of the project are eligible. This includes installation, testing, commissioning, and other hands-on activities necessary to complete the project. In-house labor costs are excluded.
Decommissioning and / or Demolition	Costs associated with the safe removal, disconnection, and disposal of existing equipment that is being replaced as part of the approved project scope are eligible. This includes activities necessary to ensure compliance with environmental and safety regulations.
Load Calculations	For Building Electrification projects only. Costs associated with the development of load sizing calculations per ASHRAE 183 or Manual J/N. These are typically associated with Heat Pump Electrification Projects
Design	For Building Electrification projects only. Limited design costs directly related to equipment sizing and load calculations may be eligible if expressly approved by the applicable Utility. Conceptual, feasibility, or redesign costs.

Table 14: Ineligible Project Costs

Ineligible Costs	Description
Permit	Permit Costs: Fees and expenses associated with obtaining permits from regulatory bodies are excluded as they are administrative in nature.
Project Management	Any costs related to overall program oversight, coordination, or general management. These are classified as administrative costs and are not eligible.
Warranty	Expenses incurred for warranties on equipment or services are excluded.
Separate Training	Costs for training sessions are not an integral part of startup testing or commissioning. General training activities are excluded.
In-House Labor	Internal labor costs (e.g., salaried staff performing work outside of contracted services) are not eligible.
Shipping and Freight	Shipping and Freight: Costs associated with transporting materials or equipment to the site are not eligible unless explicitly included in the approved scope.
Taxes	Taxes: Sales tax, use tax, and other tax-related charges are not eligible for reimbursement.
Shop Drawing	Costs associated with the creation of detailed shop drawings required for fabrication or assembly of project components are not eligible.
Spare Parts	Costs for spare or replacement parts not directly installed as part of the approved project scope are not eligible.

Electrical Service Upgrades	Costs for electrical panel upgrades or other customer costs to receive upgraded electrical service (e.g. new sleeve, shunt cables, etc.) to accommodate electrification projects, excluding elective costs like “special services at cost.”
Redundant/Standby Equipment	Costs for work impacting redundant or standby equipment.

AIA Invoices

- AIA Invoices, or more accurately, AIA payment applications, are a standardized method of billing for work completed on a construction project. They are a form of "progress billing," which means contractors are paid as the work progresses rather than in one lump sum at the end.
- AIA-style invoices (such as G702/G703 forms) are commonly used in the construction industry. They are often used in gut renovation or major renovation projects where multiple building upgrades are being installed. These forms provide a standardized and detailed breakdown of work completed, stored materials, retainage, and payment due.
- Because of their structured format and industry recognition, AIA invoices may be accepted, subject to Utility review and approval, in lieu of traditional itemized invoices if they include sufficient detail to:
 - Clearly associate the billed costs with the scope of work for the project under review.
 - Identify the project location
- AIA invoice must include a continuation sheet with detailed schedule of values.
- AIA invoices that break down scope by broad categories or division/specification numbers are not acceptable (e.g. Division 15 – Mechanical, Division 16 – Electrical).

9. Participating Contractor Eligibility

9.1. Requirements for Participating Contractors

To be eligible to submit project applications, perform work, or receive incentives through the Program, a contractor must become an approved Participating Contractor and generally remain in good standing by following program rules and requirements. To become a Participating Contractor, a contractor must:

- Complete a Participating Contractor application
- Sign the Participating Contractor agreement
- Provide a current IRS Form W-9 and Certificate of Insurance evidence at least \$1,000,000 in Commercial General Liability coverage and Workers' Compensation Coverage as required by New York State and always maintain such coverage while participating in the Program.
 - PCs must always hold Certificate of Insurance when participating in the Program. The insurer must additionally be authorized to conduct business in New York State and must be able to demonstrate financial stability, upon request, by the Utilities. Refer to the Participating Contractor agreement for detailed insurance requirements.
- Complete required Program training prior to installing the first project and attend subsequent training as required by the Program, including bi-annual webinars and live training events
- Complete at least one project in the Program annually, unless otherwise approved by the Utilities; contractors that remain inactive may be removed from Program listings
- Adhere to the Participating Contractor Participation Requirements
- Adhere to the Program requirements laid out in this Manual

- *Contractors who install Electrification measures* must provide completion documentation for a manufacturer-sponsored ASHP sizing and design training course

Only PC in good standing and consistent with the Participating Contractor Participation Requirements will be allowed to accept incentive payments on behalf of the customer. PCs may also partner with consultants, installers, etc. at their discretion. All program rules will apply, and the Utilities may request information on subcontractors and subconsultants or require training or certifications as needed. *The Utilities are not a party to any contract with a customer for the performance of work in connection with any incentives, nor are the Utilities a party to any contract with any contractor or subcontractor for the performance of any work for a customer.*

PCs must adhere to all applicable laws, regulations, codes, licensing, certification, and permit requirements pertaining to the scope of work and type of equipment installed or serviced. For example, the U.S. Environmental Protection Agency (EPA) Clean Air Act Section 608 Technician Certification is required to handle certain refrigerants used in building electrification projects. Participating Contractors are required to be aware of and comply with all such requirements pertaining to their business and are fully liable for failure to adhere to these rules and regulations. By allowing a contractor to participate in the Program, the Utilities make no representation as to the PC's business practices or compliance with applicable laws or regulations. Should the Company find that a Participating Contractor is not adhering to applicable laws, regulations, codes, licensing, certification or permit requirements, the Company will take action to discipline the Participating Contractor, up to and including removal from the program.

9.2. Participating Contractor Participation Policy

The goal of this policy is to verify that projects in the Program meet all Program requirements and that customers are satisfied with their Participating Contractor's performance.

The behavior of PCs, as reflected by their conduct and the quality of projects performed while participating in Utility programs, is important to the success of the Program. As such, the Utilities (which always may include the contractors acting on behalf of the Utilities) review PC performance, including through on-site and virtual inspections, project documentation reviews, and other assessment methods. During this process, the Utilities may review project documentation related to participation in the Program to ensure compliance with Program requirements, including applications, photographs, and forms. The Utilities may also use checklists and other assessment tools and methods to evaluate project design, the functionality of installations, as well as the status of compliance with the requirements of the Program. The Utilities may elect to inspect certain projects more than once. Such reviews may occur more than once for a given project and may occur at any time during a project's lifecycle.

If a PC, or any related entity with common ownership or management fails to comply with Program requirements, the Utilities may issue a notice describing the conduct at issue and any required corrective action. The notification will outline the behavior found to justify the notification being made, and, as appropriate, any corrective action that must be taken. The basis for any corrective action may be in response to related or unrelated behavior. While the usual approach to ensure behavior consistent with the requirements of the Program will be a tiered corrective action procedure with increasing levels of severity depending on the nature of the behavior (and with due consideration of the surrounding facts and circumstances), the Utilities shall at all times have the reasonable discretion to elect at any time a more or less severe level of corrective

action tied to the behavior, including to remove a PC from the Program, or to determine that action other than removal from the Program is appropriate. All PCs will be subject to the disciplinary process outlined in this Section 9 beginning July 15, 2026, regardless of the date of enrollment in the Program.

9.3. Participating Contractor Disciplinary Process

From the initial Participation Status of Good Standing, based on the behavior of a PC, a PC may be designated along a continuum of Levels 1 through 5:

- Level 0: *Good Standing*
- Level 1: *Warning*
- Level 2: *Probation*
- Level 3: *Short Pause*
- Level 4: *Suspension*
- Level 5: *Removal*

The Participation Status of a Participating Contractor applies across all Utility programs and may affect the participation of a Participating Contractor in the Program as well as other Utility-administered programs. The Participation Status of a Participating Contractor may also affect the eligibility of a PC to participate in the Programs of other New York State Utilities, including energy efficiency and building electrification Programs. The Participation Status of a Participating Contractor is always based on the best information available to the Utilities, and which continues to be without an endorsement by the Utilities of the work performance of a PC on behalf of a customer under the Program. A PC may be required to take steps in response to a change in designation of the Participation Status of a PC, including as it might relate to attending meetings with the Utilities Program staff, and that may relate to providing or signing a Corrective Action Plan to address behavior inconsistent with the requirements of the Program.

9.3.1. Level 0: Good Standing

Level 0: Good Standing reflects the Participation Status of a Participating Contractor designated by the Utilities to be at an adequate standard of behavior and is eligible for normal access to the privileges of participation in the Program as a PC, such as the ability to submit applications up to the limit of any contractor allocation, and eligibility to use marketing materials to be used to market the Program.

9.3.2. Level 1: Warning

Level 1: Warning reflects the Participation Status of a PC designated by the Utilities to be the lowest level severity deemed warranting action by the Utilities beyond the initial starting point of Good Standing. For example, the Participation Status of Warning is appropriate when an inspection of any project of a PC results in a Fail. The Participation Status of Warning must be addressed satisfactorily, including the curing of any related nonconformance detailed to a PC. Any subsequent behavior by a PC that would warrant another designation of Warning will be considered additive, whether earlier behavior warranting the earlier designation has been responded to successfully. Among other things, a PC may seek an extension of time to address the Participation Status of Warning, which will depend on the Utilities' discretion based on a consideration of the surrounding facts and circumstances. If a PC is unable to cure behavior inconsistent with the requirements of the Program within the time frame required by the Utilities, then the application related to the corresponding project may be cancelled. A PC may be returned to the Participation Status of Good Standing when the

Participation Status of Warning is addressed satisfactorily, or a PC may be moved along the continuum of severity.

9.3.3. Level 2: Probation

Level 2: Probation reflects the Participation Status designated by the Utilities to be the next level of severity from Warning. In addition to such behavior as might cause the Utilities to determine that a PC warrants being in the Participation Status of Probation in the first instance, or otherwise out of sequence of severity, a PC may be designated in the Participation Status of Probation when:

- Effective July 15, 2026, five percent or more of inspections conducted on projects worked on by a PC will result in a Fail;
- 20 percent or more of inspections conducted on projects worked on by a PC will result in a Flag;
- There is a first finding by the Utilities of an *Immediate Safety Concern* resulting from any inspection of a project; or
- A Participating Contractor receives a notice of a first *Confirmed Misrepresentation* (Misrepresentations are discussed with more particularity below as part of [Section 9.6](#)).

Among other things, if and when the Utilities designates a PC as being in the Participation Status of Probation, the Utilities will issue a letter that explains the reasons behind the disciplinary action and provide information related to the actions that must be taken in response, including as might relate to (i) requirements to acknowledge the notification letter (normally, an authorized representative of a PC must sign and return a copy of the letter within one week of the date of issuance, unless otherwise provided), and (ii) further disciplinary actions that might result after the period of time associated with the Participation Status of Probation is concluded. Disciplinary action will take effect whether the PC acknowledges the notification letter.

There are immediate impacts to the ability of a PC in the Participation Status of Probation to engage with the Program. For example, the Utilities will require mandatory additional training of a PC in the Participation Status of Probation, as well as implement increased oversight of relevant projects (Any exemptions for inspections, or virtual inspections will be temporary removed, requiring 100% on-site inspections). In addition, the Utilities may adjust the PC's Contractor Allocation for incentives if applicable.

In general, for a PC to be moved from the Participation Status of Probation to a designation of less severity, there must be a measurable positive response by a Participating Contractor to the notification designating the Participation Status of Probation. For example, a measurable positive response would be if 75 percent or more of inspections of the projects of a PC in the Participation Status of Probation that were installed during the Probation period results in a Pass, and if a Participating Contractor demonstrates that its management and installers have met the training requirements prescribed by the Utilities. Therefore, the length of the Probationary status may depend on the performance in quality and volume of the PC.

9.3.4. Level 3: Short Pause

Level 3: Short Pause reflects the Participation Status designated by the Utilities to be the next level of severity from Warning and Probation. For example, in addition to such behavior that may cause the Utilities to determine that a PC warrants being in the Participation Status of Short Pause in the first instance, or otherwise out of sequence of severity, a PC may be designated in the Participation Status of Short Pause when:

- A PC is not eligible to be reversed to a status of less severity following the Participation Status of Probation; or
- A PC receives a notice of a second Confirmed Misrepresentation.

Among other things, if and when the Utilities designates a PC as being in the Participation Status of Short Pause, the Utilities will issue a letter that explains the reasons behind the disciplinary action and provide information related to the actions that must be taken in response, including as might relate to (i) requirements to acknowledge the notification letter (normally, an authorized representative of a PC must sign and return a copy of the letter within one week of the date of issuance, unless otherwise provided), and (ii) further disciplinary actions that might result after the period required by the designation of Short Pause is concluded. Disciplinary action will take effect whether the PC acknowledges the notification letter.

There are immediate impacts to the ability of a PC in the Participation Status of Short Pause to engage with the Program. For a period of time provided for by the notification designating the Participation Status of Short Pause (usually, the two calendar months following the issuance of the disciplinary letter), privileges of participation in the Program by a PC will be paused, including no eligibility to submit applications to the Program (any applications received will be rejected), no eligibility for any incentive allocation (incentive allocation will usually be reduced to zero during the period), and no eligibility to make use of marketing materials associated with the Program. At the end of the period of time related to the designation of the Participation Status of Short Pause, if all actions required to address behavior inconsistent with the requirements of the Program have been taken, then a PC may again begin submitting applications up to the revised allocation permitted, and a PC will usually be designated as being in the Participation Status of Probation.

In general, for a PC to be changed from a designation of the Participation Status of Short Pause to a designation of less severity, there must be a measurable positive response by a Participating Contractor to the notification designating the Participation Status of Short Pause. Furthermore, all failed inspections must be fully cured.

9.3.5. Level 4: Suspension

Level 4: Suspension reflects the Participation Status designated by the Utilities to be the next level of severity from Warning, Probation, and Short Pause. For example, in addition to such behavior that may cause the Utilities to determine that a PC warrants being in the Participation Status of Suspension in the first instance or otherwise out of sequence of severity, a PC may be designated as being in the Participation Status of Suspension when:

- A Participating Contractor is not eligible to be reversed to a status of less severity following the Participation Status of Short Pause; or
- A Participating Contractor receives a second notice of Immediate Safety Concern related to an inspection of a project.

Among other things, if and when the Utilities designates a PC as being in the Participation Status of Suspension, the Utilities will issue a letter that explains the reasons behind the disciplinary action and provide information related to the actions that must be taken in response, including as might relate to (i) requirements to acknowledge the notification letter (normally, an authorized representative of a PC must sign and return a copy of the letter within one week of the date of issuance, unless otherwise provided), and (ii) further

disciplinary actions that might result after the period of Suspension is concluded. Disciplinary action will take effect whether the PC acknowledges the notification letter.

There are immediate impacts to the ability of a PC in the Participation Status of Suspension to engage with the Program. For a period of time provided for by the notification designating the Participation Status of Suspension (usually, the six calendar months following the issuance of the disciplinary letter), privileges of participation in the Program by a PC will be suspended, including no eligibility to submit applications to the Program (any applications received will be rejected), no eligibility for any incentive allocation (incentive allocation will usually be reduced to zero during this period), and no eligibility to make use of marketing materials associated with the Program. At the end of the period related to the designation of the Participation Status of Suspension, if all actions required to address issues have been taken, then a PC may again begin submitting applications up to the revised allocation permitted and will usually be designated as being in the Participation Status of Probation.

In general, for a PC to be changed from a designation of the Participation Status of Suspension to a designation of less severity, there must be a measurable positive response by a PC to the notification designating the Participation Status of Suspension. New companies owned by any of the owners of suspended companies will not be eligible to participate in the Program.

9.3.6. Level 5: Removal

Level 5: Removal reflects a Participation Status designated by the Utilities to be the next level of severity from Warning, Probation, Short Pause, and Suspension. For example, in addition to such behavior that may cause the Utilities to determine that a PC warrants being in the Participation Status of Removal in the first instance or other than following a Suspension, a PC may otherwise be designated as being in a Participation Status of Removal when:

- A PC is not eligible to be reversed to status of less severity following the Participation Status of Suspension;
- A PC receives a third notice of Confirmed Misrepresentation; or
- A PC receives a third notice of Immediate Safety Concern related to an inspection of a project.

Among other things, if and when the Utilities designates a PC as being in the Participation Status of Removal, the Utilities will issue a letter that explains the reasons behind the disciplinary action and provide information related to the actions that must be taken in response, including as might relate to (i) requirements to acknowledge the notification letter (normally, an authorized representative of a PC must sign and return a copy of the letter within one week of the date of issuance, unless otherwise provided). Disciplinary action will take effect regardless of PC acknowledgement of the notification letter.

There are immediate impacts to the ability of a PC in the Participation Status of Removal to engage with the Program. For a period of time provided for by the notification designating the Participation Status of Removal (usually, permanently, and following the issuance of the disciplinary letter), privileges of participation in the Program by a PC will be terminated, including no further eligibility to submit applications to the Program (any applications received will be rejected), no eligibility for any incentive allocation (incentive allocation will be reduced to zero), and no eligibility to make use of marketing materials associated with the Program. A status of Removal applies to a PC in any form of current or future organization, including any successor, alias, or new entity with common ownership or management. A status of Removal is necessitated by a serious

status of deficiency and continuing deficiency under the Program, and so is considered permanent, unless otherwise determined by the Utilities in the sole reasonable discretion of the Utilities.

New companies owned by any of the owners of removed companies will not be eligible to participate in the Program.

9.4. Obligation to Complete Projects

Unless otherwise agreed to with the Utilities, at all times and in all instances of the Participation Status of other than Good Standing (i.e., Warning, Probation, Short Pause, Suspension or Removal), a PC shall continue to have an obligation to complete existing projects undertaken, and as may be more particularly agreed to in writing with the Utilities.

9.5. Code of Conduct

PCs, subcontractors, and suppliers participating in the Program are expected to adhere to standards consistent with Con Edison's Standards of Business Conduct² and National Grid's Supplier Code of Conduct. Failure to do so may result in corrective action, up to and including Removal from the Program.

9.6. Misrepresentations

Misrepresentations are efforts directly or indirectly by a PC to mislead the Utilities as relates to participation in the Program. Instances of Possible Misrepresentation are instances when the Utilities have reason to suspect that a material misrepresentation has occurred. Instances of Possible Misrepresentation by a PC can be identified at any point during engagement with the Program, including resulting from the application process and inspections required under the Program. Examples of instances of Possible Misrepresentation by a PC include:

- Providing false or misleading information related to the Program to the Utilities or to any third party, including by:
 - Misrepresenting the Program in any form or forum (including non-compliant advertisements, offering to complete projects at no cost to the customer).
 - Submitting incorrect (falsified, or otherwise) project documentation (such as photos, customer or contractor signatures, project costs, or lists of equipment installed) related to the Program; and/or
 - Refusing to respond or responding improperly to inquiries related to the Program;
- Failing to apply appropriate incentives to offset customer costs or to appropriately notify a customer of incentives the contractor receives on their behalf;
- Altering site conditions improperly to change eligibility for Program offerings;
- Taking steps directly or indirectly to impede inspections by denying access to facilities related to the Program, including to instruct or encourage building owners or tenants to refuse entry;
- Instructing or encouraging customers to provide false or misleading information to the Utilities or to the Utilities IC, and to include turning a blind eye to such practice;
- Misrepresenting the relationship of a contractor to the Utilities, including by informing any third party (including customers) that a PC is working on behalf of the Utilities or is otherwise authorized by the Utilities to perform work (A PC is not employed by the Utilities and is part of a network of contractors

² See, <https://cdne-dcxprod-sitecore.azureedge.net/-/media/files/conedison/standards-of-business-conduct.pdf?rev=316005b65a3a42a38071f1fd9c8647f9>

made available to customers eligible to participate in the Program; customers independently retain PCs to perform work and at times designate PCs to receive Program incentives.);

- Representing the Utilities or the Utilities programs in a manner that could adversely affect the Utilities, including the Utilities' business, operations, reputation, and good standing with the Utilities' customers or the community; or
- Performing work that does not comply with laws, including local, state, or other applicable codes, standards, or requirements.

A PC must respond promptly to all inquiries related to investigations of instances of Possible Misrepresentation, including, as may be requested, to submit revised program documentation and other information related to the issue under investigation. Once the Utilities have conducted an inquiry related to an instance of Possible Misrepresentation, the Utilities will determine whether the instance investigated is Unfounded or a Confirmed Misrepresentation. No further action will be required for inquiries resulting in a finding of Unfounded, and findings of a Confirmed Misrepresentation will result in the Utilities direction as to the nature of the remedy deemed appropriate. Without limitation, a failure to respond to Utilities' inquiries within one week, or efforts to deny access to investigate a Possible Misrepresentation, may, in the Utilities discretion, result in an immediate finding of Confirmed Misrepresentation.

10. Program Manual Revisions

The following table provides a high-level summary of revisions made in this version of the Program Manual. This summary is provided for convenience only and does not replace or modify the operative provisions of the Program Manual.

Revision No.	Section	Summary of Revisions	Impact/Notes
1	Entire Manual	MFEEP and AMEEP manuals were combined into a single Program Manual applicable to both Market Rate and Affordable Housing projects	Previously, MFEEP, AMEEP, and CHP were documented separately for market-rate multifamily. The 2026 Program Manual consolidates MFEEP and AMEEP into a single, unified manual governing both programs.
2	Introduction; Program Overview	Manual applicability revised to cover Con Edison MFEEP and AMEEP and National Grid Downstate AMEEP only	This consolidated manual applies only to Con Edison MFEEP, Con Edison AMEEP, and National Grid Downstate AMEEP.
3	Program Structure; Measure Pathways	Electrification (formerly the "Clean Heat Program") was integrated into MFEEP and AMEEP as the Building Electrification Pathway	Electrification is no longer a standalone or separately branded program; it is embedded within MFEEP-E and AMEEP-E pathways
4	Measures & Inspections	Technical requirements and inspection checklists moved to a separate "MFEEP & AMEEP Technical and Inspections Guide"	In the 2025 MFEEP, AMEEP and CHP manuals, detailed technical requirements and inspection guidance were included in the Program Manual. In 2026, these materials were moved to

			a standalone Technical and Inspections Guide
5	Manual Structure	Eligible measures and incentive values removed from the Program Manual and relocated to a standalone Incentive Fact Sheet	The 2025 MFEEP, AMEEP, and CHP manual contained detailed incentive tables. The 2026 Program Manual references a standalone Incentive Fact Sheet, allowing incentive values and eligible measures to be updated without revising the full Program Manual
6	Program Deadlines	New standardized installation timelines by pathway and project type	The 2026 Program Manual introduces standardized installation timelines (e.g., 3, 6, 12, 24 months) by pathway and project type
7	Contractor Requirements	Expanded Participating Contractor disciplinary framework (Levels 0–5)	The 2026 manual introduces a tiered Participating Contractor disciplinary framework (Levels 0-5), replacing the prior probation-based approach
8	Incentive Guidelines	Energy Efficiency cost caps clarified by program	No change was made to AMEEP Energy Efficiency cost caps from the 2025 AMEEP Program Manual (up to 85% of total eligible project cost). MFEEP Energy Efficiency cost caps remain up to 70% of total eligible project cost.
9	Incentive Guidelines	Building Electrification cost caps were established as a distinct pathway, with MFEEP Electrification projects capped at up to 50% of total eligible project cost and AMEEP Electrification projects capped at up to 85%	MFEEP Electrification projects are capped at up to 50% of total eligible project cost, while AMEEP Electrification projects remain capped at up to 85% of total eligible project cost.
10	Incentive Guidelines	Dollar caps clarified by utility and program	Con Edison projects are subject to a maximum incentive cap of \$1,000,000 per project. National Grid Downstate AMEEP projects are subject to a maximum incentive cap of \$500,000 per project or 70% of total eligible project cost, whichever is lower

11. Terms and Conditions

These Terms and Conditions are applicable to a Customer (as defined below), including those duly authorized to act on behalf of a Customer, participating in the Multifamily Energy Efficiency Program (“MFEET”) and the Downstate Affordable Multifamily Energy Efficiency Program (“AMEET”) (collectively, the “Program”), when a Customer’s utility is Consolidated Edison Company of New York, Inc.; KeySpan Gas East Corporation d/b/a National Grid; and The Brooklyn Union Gas Company d/b/a National Grid NY. Each utility shall be referred to individually as a “Utility” and collectively as the “Utilities.” References to a Utility or the Utilities shall, unless the context indicates otherwise, be presumed to refer to the individual Customer’s Utility or Utilities.

1. ELIGIBILITY

The Program offers financial incentives for energy efficiency and building electrification measures to eligible customers (“Customers”) who are property owners or managers of existing multifamily residential buildings with five (5) or more dwelling units. Additional eligibility requirements apply depending on whether a project participates in MFEET or AMEET, as set forth in the Program Manual. For AMEET projects, a multifamily building is considered “affordable” and eligible if it was developed and is being maintained as affordable housing. Supporting documentation must be provided to demonstrate eligibility. Acceptable documentation includes, but is not limited to, regulatory agreements or mortgages from housing agencies such as U.S. Department of Housing and Urban Development (HUD) and New York City Department of Housing Preservation and Development (HPD).

A building may also qualify through its rent roll if at least 25% of the units are occupied by households with a calculated household income of no more than 80% of Area Median Income or State Median Income, whichever is higher. Applicants must submit annual rent, unit size, and occupancy information for each apartment.

The Utilities will not offer incentives or rebates for the same eligible measure if the Customer has already received incentives from NYSEDA or another electric or gas utility company. Customers applying for technical assistance must do so in accordance with the Multifamily Energy Efficiency Program Program Manual, as amended from time to time.

2. PROGRAM MANAGEMENT

The Program may be implemented and managed by an implementation contractor under contract with a Utility. Accordingly, program obligations may be undertaken by either the Utility or its implementation contractor (including subcontractors), whether or not expressly stated. Any such arrangements do not alter a Customer’s obligations under these Terms and Conditions.

3. QUALIFYING PROJECTS AND MEASURES

Qualifying projects include energy-efficiency measures identified as eligible for incentives in accordance with Program rules and based on an energy survey of the building. Unless otherwise approved by a Utility, qualifying projects do not include measures, equipment, or services purchased, contracted for, or installed prior to the

project start date. If a Customer receives electric and gas service from more than one utility, the Utility providing electric service will generally manage the project and distribute incentive payments.

4. PROGRAM APPLICATION / PARTICIPATION AGREEMENT

By signing the Program Application, the Customer authorizes building entry for Program purposes, including: Conducting energy surveys of common areas and individual units; installing measures in individual units; installing agreed-upon energy-efficiency measures; inspecting pre-existing conditions and installed measures; evaluating the performance of installed measures.

5. INCENTIVE AMOUNTS

Incentive amounts are set forth in the Program Manual. Decisions regarding incentives are final, subject to the Program Manual. The Utilities reserve the right to change measures and incentives at any time without prior notice. Written commitments made prior to such changes will be honored provided installations are completed in accordance with the Notice to Proceed. Failure to comply with Program requirements may result in incentives being reduced or withheld. Incentive availability is contingent on funding authorized by the New York State Public Service Commission (PSC).

6. CUSTOMER WORK AUTHORIZATION AND PROJECT WORK PLAN

Building objectives will be discussed with the Customer, including alternatives, process, scope of work, and schedule. Installation subcontractors may be proposed by or on behalf of a Utility, or the Customer may select a contractor from an approved list or choose an outside contractor. Contractors may be required to meet qualification, insurance, compliance, and good-standing requirements.

7. IMPLEMENTATION OF WORK, PAYMENT OF INCENTIVES, AND INSPECTION REQUIREMENTS

Customers must pay their share of measure costs no later than completion of installation. Upon satisfactory project completion, incentive payments will be arranged for the Customer or, if authorized, paid directly to the contractor. Post-installation inspections may be conducted at the Utility's discretion. For comprehensive projects, mid-project payments may be available upon request for fully completed and inspected prescriptive measures. Customers agree to cooperate with follow-up visits and provide requested energy systems data for program evaluation purposes.

8. CUSTOMER INFORMATION AND PROGRAM APPLICATION

Customer information, including consumption data and project details, may be shared with Utilities' evaluation contractors, PSC, DPS Staff, and NYSERDA for program management and evaluation, subject to confidentiality protections. Information shared with PSC or DPS Staff will be aggregated and not personally identifiable.

9. TAX LIABILITY AND CREDITS

Each Customer is responsible for any taxes resulting from Program participation and must provide a valid Federal Tax Identification Number.

10. DISPUTES

The Utilities have sole discretion to resolve Program-related disputes, including eligibility and incentive determinations.

11. PROGRAM CHANGES

The Utilities may change, modify, or terminate the Program at any time without liability, except as expressly stated herein. Written commitments made prior to such changes will be honored if installations are completed per the Notice to Proceed.

12. PROGRAM EXPIRATION

The current Program cycle is expected to operate through December 31, 2030, subject to funding availability, PSC authorization, and Utility modification or termination rights.

13. DISCLAIMER

No warranties or guarantees are made regarding energy savings or performance. Customers are advised to consult qualified professionals. Utilities are not parties to contracts between Customers and contractors.

14. INSTALLATION REQUIREMENTS

All work must comply with the Program Manual and applicable laws and regulations. Removed equipment must be properly disposed of in accordance with all legal requirements.

12. Contact Information

General Program Inquiries (Con Edison)

For questions related to program policy and overall program information:

- **Email:** multifamily@coned.com

Program Implementation & Application Support (Willdan Energy Solutions)

For assistance with project applications, eligibility requirements, technical documentation, project status, and processing support:

- **Con Edison Multifamily Program:**
 - **Email:** ConEdMultifamily@willdan.com
- **National Grid LMI Program:**
 - **Email:** NationalGridLMI@willdan.com

Customer & Contractor Helpline

For support related to active projects, application status, and general assistance:

- **Phone:** 1-844-316-4288
- **Hours:** Monday–Friday, 9:00 AM–5:00 PM (ET)

The Con Edison Multifamily Program and the National Grid Affordable Housing Multifamily Program are administered by Willdan Energy Solutions on behalf of Con Edison and National Grid. Willdan Energy Solutions acts solely as an implementation contractor on behalf of the Utilities and does not have independent authority to bind Con Edison or National Grid.

13. Glossary of Terms

This glossary provides definitions of key terms used in this Program Manual.

Comprehensive Path or Pathway: An AMEEP or AMEEP-E participation track for customers undertaking comprehensive retrofits that address multiple building system categories (e.g., heating and cooling, insulation, lighting). Incentives are applied based on a system of accumulated points. A minimum of 80 points is required for AMEEP Energy Efficiency comprehensive projects, and a minimum of 50 points is required for AMEEP-E comprehensive projects.

Post Inspection: An inspection conducted by the Utilities or their Implementation Contractor after installation is complete to verify that installed measures meet Program requirements.

Custom Path, Pathway or Project: A project that includes custom measures. Custom measures are eligible measures that are not listed in the New York State Technical Resource Manual. Custom calculations are required to determine the amount of energy savings and incentive amount.

Eligible Customer (AMEEP): Property owners or managers of existing affordable multifamily buildings with five (5) or more residential units that meet AMEEP affordability requirements.

Eligible Customer (MFEEP): A property owner or property manager of an existing marketrate multifamily residential building with five (5) or more dwelling units that receives electric and/or gas delivery service from Consolidated Edison of New York, Inc., contributes to the System Benefits Charge (SBC), and otherwise meets MFEEP eligibility requirements.

Energy Efficiency Measures (EEMs): Energy-using appliances, equipment, control system, or practice whose implementation results in reduced energy use while maintaining a comparable or higher level of service. Categories of EEMs include HVAC measures; base load measures such as lighting, process loads, plug loads, etc.; envelope measures; and non-interactive measures such as service water heating.

FlexTech Program: A NYSERDA program which shares the cost of and provides additional support related to an energy audit to facilitate the implementation of clean energy and/or energy efficient technologies in a building.

Implementation Contractor (IC): The Utility's Implementation Contractor oversees coordination of the project on behalf of Utilities. Communication from the customer and/or Participating Contractor will be facilitated through the Utility's IC.

Incentive Cap: The maximum incentive an Energy Efficiency Measure or project is eligible to receive through MFEEP or AMEEP.

In-Unit Measures: Energy Efficiency Measures installed within the primary dwelling of a resident.

Market Rate Building: A non-subsidized multifamily residential building that does not meet the affordability requirements of AMEEP.

New York State Research and Development Authority (NYSERDA): A New York State public-benefit corporation established in 1975. NYSERDA offers objective information and analysis, innovative programs, technical expertise, and support to help New Yorkers increase energy efficiency, save money, use renewable energy, and reduce reliance on fossil fuels.

Non-Comprehensive Pathway: Track to participate in AMEEP or AMEEP-E for customers who are interested in smaller upgrades, or customers who have projects that do not meet the 80-point minimum for the AMEEP comprehensive pathway or 50-point minimum for the AMEEP-E comprehensive pathway.

Non-Wires Solutions (NWS) Neighborhood Adder Incentive Program: An MFEEP or AMEEP incentive offering for eligible electric customers in designated NWS areas, which may, where expressly approved by Con Edison, provide

additional incentives that can offset up to 100 percent of eligible project costs, subject to all Program requirements and caps.

Notice to Proceed (NTP): An email outlining estimated project savings and incentives issued by the applicable Utility or its IC that triggers the start of work on a project. Any work started before the Notice to Proceed will not qualify for incentives.

On-site Inspection: A pre- or post-installation inspection that is done in person by the Implementation Contractor or the Utility.

Participating Contractor (PC): A contractor that will install Energy Efficiency Measures through the project. Participating Contractors must be approved by the Program. Participating Contractors may accept incentive payments on behalf of customers. The program can onboard contractors into the Participating Contractor network at any time.

Preliminary Incentive Offer Letter (PIOL): Issued after eligibility determination and required reviews, including pre-inspection and/or engineering review, as applicable, for custom projects, and after finalizing the scope of work for comprehensive projects. The PIOL includes an incentive offer and date range for which the offer is eligible. The PIOL must be signed by the customer and returned to the Utility's IC within 30 days.

Prescriptive Path, Pathway or Project: A project that includes prescriptive measures only. Prescriptive measures are those listed in the New York State Technical Resource Manual (TRM) and have set incentive rates.

Scope of Work: A detailed explanation of work that will be performed as part of a contract or subcontract. It defines project-specific activities, deliverables, and timelines for a vendor providing services to the client.

Statement of Completion (SOC): A document that details the Energy Efficiency Measures that were installed through the project. Must be signed and submitted to the Utility at project completion.

Technical Assistance: Services provided by Utilities and Energy Providers to help customers identify energy efficiency opportunities and develop comprehensive Scopes of Work. Energy audits are performed as a form of technical assistance.

Technical Resource Manual (TRM): The New York Standard Approach for Estimating Energy Savings from Energy Efficiency Programs - Residential, Multifamily, and Commercial/Industrial, known as the Technical Resource Manual (TRM), provides a standardized, fair, and transparent approach for measuring program energy savings across New York State's energy efficiency programs. To do so, the TRM provides standardized energy savings calculations and assumptions at the measure level for estimating energy and demand savings.

Virtual Inspection: A pre- or post-installation inspection that is done virtually by the Implementation Contractor or the Utility. Virtual inspections will include either: 1) a live video call walkthrough with the contractors or energy providers and the inspector (inspector takes screenshots and/or notes to document findings); or 2) date and time-stamped pictures and/or video recordings that clearly captures existing equipment to be replaced (in case of pre-inspection) or the new energy efficient equipment (in case of post-inspection).