

From Outreach to Implementation: A Tiered Model for Community Organization Participation in Energy Programs

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ABSTRACT

In New York City, many affordable housing stakeholders face high energy burdens, often spending a disproportionate share of their income on utility costs. Energy efficiency programs for affordable housing are essential to reducing these costs, improving building performance and comfort, and supporting long-term housing and financial stability for residents.

To expand equitable access New York energy efficiency programs, Kinetic Communities Consulting (KC3) developed a structured Community-Based Organization (CBO) participation framework in coordination with Consolidated Edison Company of New York (Con Edison) and Willdan Energy Solutions (Willdan). The framework creates clear pathways for CBOs to support outreach, lead generation, and application assistance for the Downstate New York State Affordable Multifamily Energy Efficiency Program (AMEEP).

The initiative formalizes CBO participation through a standardized enrollment and compensation model that enables eligible organizations to refer buildings using consistent intake tools and receive payment for verified outreach and application support. KC3 coordinates tracking and payments, monitors lead sources, and ensures timely compensation. KC3 also provides onboarding, program orientations, outreach materials, and ongoing capacity-building to help CBOs effectively promote AMEEP.

Through targeted, on-the-ground engagement, participating CBOs increase awareness and enrollment among affordable housing stakeholders. By compensating trusted community organizations for outreach and technical support, the framework leverages existing relationships with building owners and property managers while recognizing the expertise CBOs bring to their communities.

In 2026, AMEEP will onboard up to 10 CBOs across New York City, forming a coordinated cohort to support enrollment, share best practices, and inform continuous program improvement.

Addressing Energy Burden in New York City Through Community-Based Partnerships

Energy burden remains a significant challenge in New York City, with approximately 25% of households spending more than 6% of their income on energy costs (Ayala and Dewey, 2024). This amounts to between 600,000 and 1.8 million families, and nearly 30% of New Yorkers report being unable to meet their basic energy needs (Bogtish, Callahan, and Yeung, 2025). The burden falls disproportionately on low-income, Black, and Latino households, with some residents spending up to 34% of their income on energy bills (Ayala and Dewey, 2024). These high energy costs can force households to make difficult tradeoffs between paying utility bills and covering other essential expenses, such as food, housing, healthcare, and transportation.

Reflecting these financial pressures, 42% of New Yorkers have fallen behind on energy payments within the past five years (Bogtish, Callahan, and Yeung, 2025). Taken together, these indicators suggest that energy affordability is not only a persistent challenge but also a growing crisis for many New York City residents.

Affordable housing buildings in low- and moderate-income (LMI) communities¹ face persistent barriers to implementing energy efficiency measures, including limited access to capital, lack of program awareness, and distrust of external institutions. These communities have also historically been excluded from energy planning and decision-making processes, resulting in policies that often overlook lived experience and community priorities (Ayala, Dewey, and Drehtobl 2021).

CBOs working with LMI communities to reduce energy burden through clean energy programs often provide labor-intensive, relationship-based services that extend beyond traditional outreach activities. These services can include building trust with residents, conducting one-on-one education, helping households navigate complex application processes, coordinating with multiple service providers, and providing ongoing case management to support program participation. However, traditional energy efficiency program funding structures frequently prioritize measurable outputs, such as enrollments or completed projects, rather than the time and resources required to engage hard-to-reach households and sustain participation. As a result, compensation may not fully reflect the scope of services provided, while payment delays can further strain organizations operating with limited financial reserves (NFF 2025). An EPA report similarly underscores how partnerships with CBOs can improve building stock, lower utility costs for tenants, and strengthen financial stability for affordable housing owners (US EPA 2018).

CBOs play several critical roles in advancing equitable energy efficiency adoption:

- **Building Trust and Overcoming Skepticism:** CBOs serve as trusted messengers, helping residents and building stakeholders feel confident engaging in programs that may otherwise be perceived as complex or risky.
- **Navigating Complex Procedures:** By providing one-on-one assistance with income verification, documentation, and enrollment, CBOs reduce administrative barriers that often limit participation.
- **Co-Designing Solutions:** CBOs ensure energy upgrades align with local priorities such as indoor air quality, health, and safety—not just cost savings.
- **Addressing Split Incentives:** By engaging both landlords and tenants, CBOs help overcome structural barriers in affordable housing where costs and benefits are distributed across different parties (Ayala, Dewey, and Drehtobl 2021).
- **Supporting Workforce Development:** CBOs also connect residents to clean energy job opportunities, supporting broader economic mobility.

To address these structural inequities, energy efficiency programs must prioritize equity-driven engagement models, with CBOs essential to this effort. As trusted, culturally competent

¹ The Affordable Multifamily Energy Efficiency Program (AMEEP) defines affordable housing as buildings in which at least 25% of the dwelling units are, or are expected to be, occupied by households earning no more than 80% of the area or State median income, whichever is higher.

institutions embedded within their communities, CBOs help bridge the gap between program design and real-world implementation, improving program accessibility and supporting more effective participant engagement and program delivery. Their role is especially critical in affordable housing, where program participation often requires navigating complex eligibility requirements, financing coordination, and multi-step approval processes.

Partnering with CBOs in New York City is critical for successfully engaging affordable housing stakeholders in energy efficiency and retrofit programs. This approach can also serve as a model for other cities and metropolitan areas across the country facing similar challenges in reaching LMI communities and accelerating building decarbonization. CBOs include ingroups such as housing advocacy groups, faith-based organizations, neighborhood nonprofits, and community development institutions. These groups are deeply embedded in the communities they serve and are widely trusted by building owners, boards, and residents. Even when CBOs are not technical experts, building decision-makers often turn to them for guidance on housing repairs and energy upgrades (Gabrielse, Hyman, and Walker 2025).

Effective CBO partnerships require sustained relationship-building, alignment with community missions, and tangible support. Between 2018 and 2020 KC3 and the Urban Homesteading Assistance Board (UHAB) helped formalize partnerships between CBOs and government-led clean energy initiatives in New York City. This resulted in affordable housing owners representing Housing Development Fund Corporation (HDFC) limited-equity cooperatives². By 2021, HDFCs working with UHAB became advocates for pursuing energy efficiency upgrades resulting in reduced heating costs, and improved comfort for rent-stabilized tenants and low-income cooperative homeowners (Levin, Sanchez, and Tajima 2018).

The property owners themselves later became advocates, demonstrating the ability of CBO partnerships to not only drive project adoption but also to create lasting, peer-driven momentum for increased program participation and awareness. Overall, CBOs serve as essential intermediaries that translate program offerings into real-world action, making them indispensable to equitable, scalable energy efficiency delivery in affordable housing.

Working with local, community-serving institutions increases participation in residential and commercial programs and strengthens relationships between utilities and residents (Drehodl and Tanabe 2019). The World Resources Institute highlights how CBOs support energy burden reduction by assisting with contractor vetting, managing paperwork, and helping LMI households access clean energy upgrades (Gabrielse, Hyman, and Walker 2025).

In programs such as AMEEP, integrating CBOs into outreach, lead generation, and application support strengthens conversion rates, reduces drop-off across program stages, and ensures incentives reach buildings with the greatest need. Formalizing and compensating CBO participation creates a durable, community-centered delivery model that advances housing affordability, climate goals, and equitable economic opportunity.

² HDFCs are a special type of limited-equity housing cooperative in New York State, incorporated under the New York State Housing Finance Law. Under this law, the city of New York can sell buildings directly to tenants or community groups to provide low-income housing. Many but not all HDFCs are organized as co-ops. All HDFCs are required to provide housing affordable to low-income residents.

Importance of Energy Efficiency Programs in New York City

AMEEP plays a critical role in advancing both housing affordability and climate action across New York State. Buildings account for nearly 70% of New York City's greenhouse gas emissions, making the building sector a critical focus of the city's climate strategy (New York City Comptroller 2022). Within this sector, affordable multifamily properties represent an important opportunity for emissions reductions, but many face financial and operational barriers to implementing needed energy efficiency and building electrification upgrades. As a result, ensuring that affordable housing can participate in the clean energy transition is essential to achieving both the city's climate and housing affordability goals. AMEEP helps address this gap by providing financial incentives and technical support to affordable housing owners to reduce energy use, lower operating costs, and improve tenant comfort.

By supporting energy-efficient building upgrades, AMEEP not only reduces utility expenses for building owners and residents, while decreasing carbon emissions, further advancing the goals outlined in the New York State's climate goals (New York State Climate Action Council 2022). The program is jointly administered by the New York State utilities in partnership with the New York State Energy Research and Development Authority (NYSERDA), forming part of a broader statewide strategy to decarbonize buildings while preserving housing affordability. AMEEP offers the following three participation pathways to meet buildings at different stages of readiness and project scale (Con Edison 2025).

1. Comprehensive Pathway

The AMEEP Comprehensive Pathway is designed for whole-building retrofits that address multiple building systems (e.g., heating, cooling, roof and wall insulation) and includes incentives for gas and electric measures. Projects accumulate points based on measures installed and must meet a minimum threshold to qualify as comprehensive. Benefits to building stakeholders of the Comprehensive Pathway include:

- Higher incentive levels³ compared to other pathways
- Optional mid-project incentive payments
- Access to technical assistance through NYSERDA's FlexTech program (including cost-sharing for audits and scope development)

2. Non-Comprehensive Pathway

The AMEEP Non-Comprehensive Pathway is intended for smaller, targeted upgrades or projects that do not meet the comprehensive point threshold. This pathway allows buildings to pursue incremental improvements while still receiving financial support for standalone energy conservation measures (e.g., pipe insulation, boiler replacement, air sealing, energy management systems) and provides incentives for both gas and electric measures.

³ The AMEEP Comprehensive Pathway uses a points-based system, requiring projects to achieve at least 80 points to qualify for incentives. Projects that implement multiple energy-saving measures and deliver broader building performance improvements can access higher incentive levels than those available through the non-comprehensive pathway which provides prescriptive incentives based on specific equipment installations.

3. AMEEP-E (Electrification Incentives)

AMEEP-E is focused specifically on electrifying space heating, cooling, and domestic hot water systems. AMEEP-E supports both comprehensive electrification retrofits and single-measure upgrades. Incentives are structured either on a per-dwelling-unit basis for whole-building projects or by individual energy conservation measures. AMEEP-E incentives are available through both the Comprehensive and Non-Comprehensive Pathways, allowing buildings to access electrification incentives based on the scale and scope of their planned upgrades.

Through these various pathways, AMEEP provides flexible options that allow affordable multifamily buildings to pursue upgrades aligned with their capital planning cycles, financing capacity, and long-term decarbonization goals. By combining incentives, technical assistance, and electrification support, AMEEP serves as a foundational tool for reducing energy burden, strengthening building performance, and accelerating progress toward New York’s climate and housing objectives.

CBO Multifamily Partner Identification & Recruitment

CBO recruitment in support of AMEEP was guided by a set of strategic criteria designed to identify organizations best positioned to support effective, equitable outreach and program delivery. Initial outreach prioritized organizations with established relationships with KC3 and a demonstrated track record in affordable multifamily housing, energy equity, and access to energy efficiency resources or financial assistance programs.

Priority was given to CBOs whose core missions align with key program goals, including community empowerment, affordable housing preservation, utility bill support, workforce development, and environmental justice. Organizations were also evaluated based on their alignment with one or more of the proposed CBO engagement focus areas of outreach and awareness and application support, ensuring that outreach efforts targeted partners with the capacity and interest to participate meaningfully in the initiative (Figure 1).

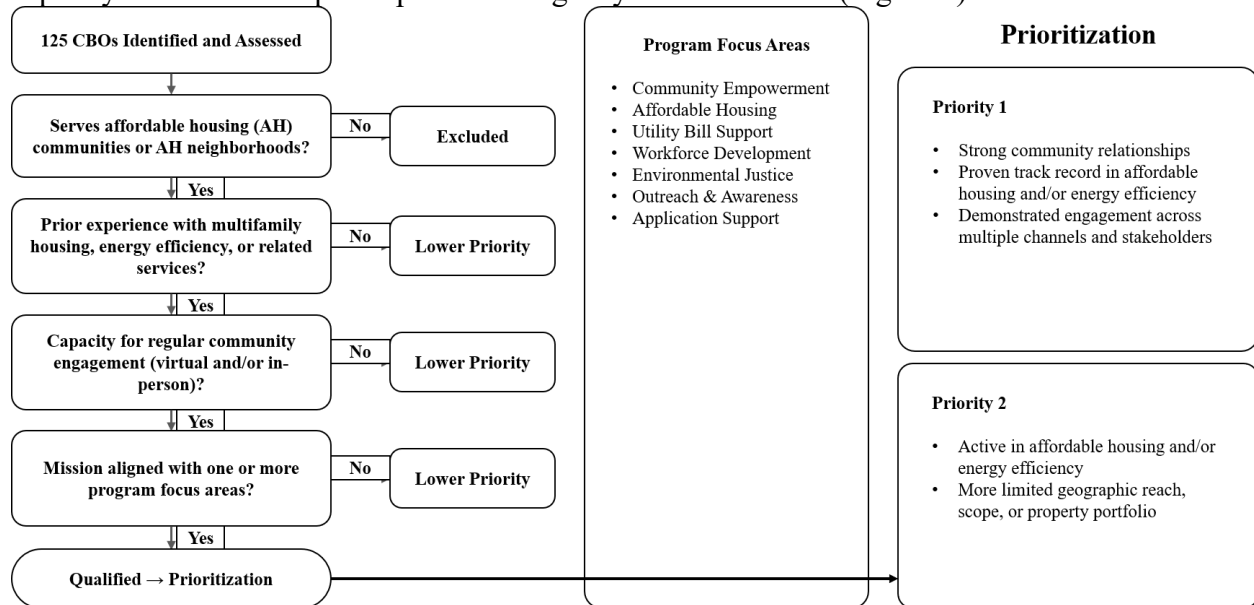


Figure 1. Selection Process for Identifying CBOs for AMEEP Participation

In addition to housing- and energy-focused CBOs operating in New York City and the surrounding region, recruitment efforts placed a deliberate emphasis on Weatherization Assistance Program⁴ (WAP) providers. These organizations represent a critical opportunity to strengthen coordination between utility-administered programs and federal resources, enabling customers to layer incentives and maximize total project savings across multiple funding streams.

In total, more than 100 organizations across New York City and the greater metropolitan area were initially considered. KC3 then conducted a targeted review of organizations' experience in affordable housing and energy efficiency to develop a prioritized shortlist of 12 CBOs for engagement in this cohort (Table 1).

Table 1. Prioritized CBOs for initial Multifamily Partner Program Recruitment

CBO Name	Mission	Outreach Experience
Urban Homesteading Assistance Board (UHAB)	Advance safe, affordable housing and tenant voice in community decision-making.	• Tenant & board technical assistance
		• Tenant coordination
		• AMEEP energy efficiency services
Enterprise Community Partners	Promote stable, affordable housing and address housing inequities.	• Affordable housing technical assistance
		• Financing & incentive coordination (AMEEP, NYSERDA)
		• Policy & preservation outreach
Association for Neighborhood & Housing Development (ANHD)	Strengthen equitable neighborhoods and affordable housing in NYC.	• Community organizing & housing advocacy
		• Energy efficiency services (AMEEP, NYSERDA)
Green City Force	Prepare New York City Housing Authority (NYCHA) and low-income residents for green careers and healthy communities.	• NYCHA resident outreach
		• Workforce development
		• Community engagement
WE ACT for Environmental Justice	Advance environmental justice and healthy communities.	• Environmental campaigns & education
		• Energy efficiency services (NYSERDA)
Sunset Park Redevelopment Committee	Develop and preserve affordable, energy-efficient housing in Sunset Park.	• WAP vendor

⁴ The New York State Weatherization Assistance Program (WAP) helps income-eligible homeowners and some renters reduce energy costs by funding energy efficiency, health, and safety upgrades that lower heating, cooling, and utility expenses. Administered by NYS Homes and Community Renewal, WAP has improved the energy efficiency of more than 744,000 homes statewide since 1977, supporting both single-family and multifamily affordable housing (HCR 2025).

Crown Heights Jewish Community Council (CHJCC)	Support housing stability and community well-being in Crown Heights.	• WAP vendor
Cypress Hills Local Development Corporation (CHLDC)	Preserve affordable housing and strengthen East New York communities.	• Community development & organizing
		• Housing & workforce programs
Bedford Stuyvesant Restoration Corporation (BSRC)	Promote economic mobility and close racial wealth gaps in Central Brooklyn.	• WAP vendor
Margert Community Corporation (MCC)	Provide housing assistance and preservation services in Queens and NYC.	• WAP vendor
		• NYSERDA EmPower+ ⁵ & RESTORE ⁶ programs
Sustainable Westchester	Deliver local climate and clean energy solutions in Westchester County.	• Clean energy transition initiatives
		• Energy efficiency investment programs

Selected CBOs share a strong, mission-driven commitment to affordable housing stability, equity, and community empowerment, with deep ties to low-income and historically marginalized communities based on organizations' previous activities, events, and programs they are actively involved in or have been historically involved in. Their work spans housing preservation, tenant advocacy, environmental justice, workforce development, and clean energy career pathways, positioning them as trusted intermediaries between residents, building stakeholders, and program administrators. These organizations bring extensive, hands-on outreach experience, including tenant and board support, housing advocacy, and direct engagement with energy efficiency programs such as AMEEP, NYSERDA initiatives, and WAP. Together, this combination of trust, technical experience, and community presence supports high-touch engagement and sustained participation in affordable multifamily energy efficiency programs. While not included in the initial 2026 cohort, additional organizations, such as chambers of commerce, trade associations, and mission-driven lending institutions (e.g., the Business Outreach Center (BOC) Network), were identified for potential engagement in future phases of the program.

CBO Multifamily Partner Compensation Structure

Successfully reaching affordable housing communities requires trusted local partners that can conduct outreach, build awareness, and help residents and property owners navigate program participation. To support these efforts, AMEEP developed a CBO engagement framework that aligns organizational capacity with specific program implementation activities and corresponding compensation. The CBO engagement framework is structured into two focus

⁵ EmPower+ supports income-eligible homeowners and renters of one- to four-family homes by providing no-cost energy assessments and direct-install upgrades to reduce energy use and lower utility bills. The program also offers funding for improvements such as insulation, air sealing, heat pumps, heat pump water heaters, and necessary electrical upgrades to help households make deeper energy efficiency upgrades.

⁶ The Residential Emergency Services to Offer (Home) Repairs to the Elderly (RESTORE) program provides funding to help income-eligible senior homeowners (age 60 and older) address emergency repairs and code violations that threaten their health, safety, or ability to remain in their homes.

areas. The tiered structure focusing on 1) Outreach & Awareness and 2) Application Support⁷ matches CBO capacity and interests to program implementation needs (Figure 2).

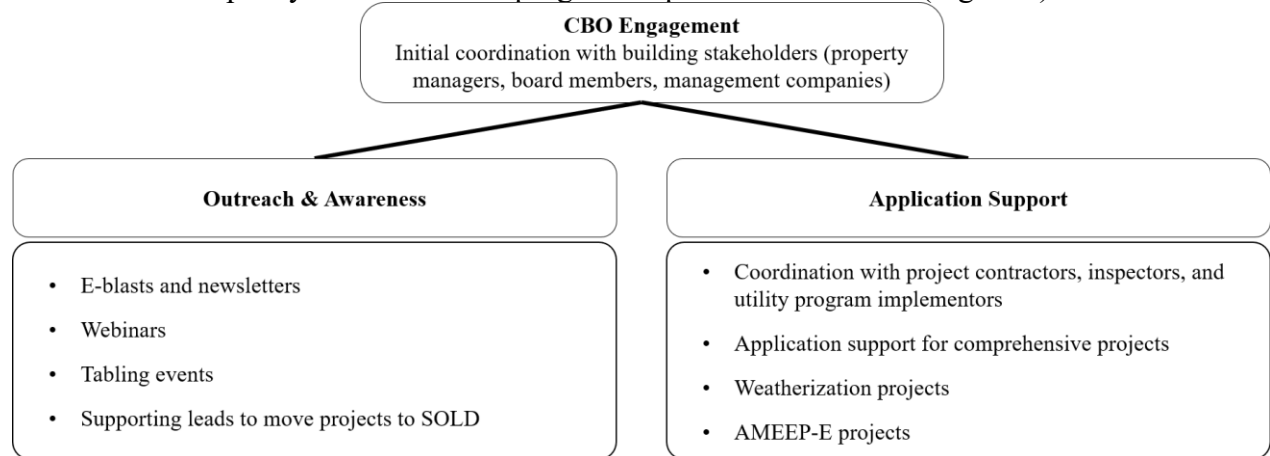


Figure 2. Overview of CBO Tiers for AMEEP Support

Compensation is based on tiers and activities to reflect level of effort and deliverables needed from CBOs. To further incentivize CBOs while also recognizing the need to cover adequate CBO time, planning, and resources to be prepared for deployment, AMEEP offers CBOs each a \$5,000 sign-on bonus. This model promotes program alignment while elevating the critical role of CBOs in connecting with their local communities to obtain incentives for energy efficiency upgrades through AMEEP.

Below is an overview of the current AMEEP program stages and corresponding definitions for reference (Table 2).

Table 2. AMEEP Program Stages and Definitions

Program Stage	Definition
Sold	Contractor assigned to the project submits project deliverables on Viewpoint ⁸ : Completed AMEEP program application, W9 form, cut/specification sheets for scope of work, and signed contractor proposal.
Pre-Inspection	A third-party inspector audits the existing conditions of the proposed scope of work onsite. The pre-inspection must receive a “Pass” to move to Committed.
Committed	The project receives a Preliminary Incentive Offer Letter (PIOL) and Notice to Proceed (NTP). The project can begin installation upon receiving both documents.

⁷ CBOs may choose to participate in key activities in either or both Outreach & Awareness and Application Support.

⁸ Viewpoint is the designated system portal where contractors are required to submit projects to the NYS AMEEP program.

Installed	The contractor completes installations and submits completion paperwork on Viewpoint: Statement of Completion, photo/video documentation of installed measure depending on the scope of work.
Post-Inspection	A third-party inspector audits the installations of the proposed scope of work onsite. The post-inspection must receive a “Pass” to move to Acquired.
Acquired/Approved	Project moves to closeout. Program administrators issue the incentive to the designated payee.

Outreach & Awareness

The outreach and awareness tier focuses on how CBOs will spread awareness to their communities and generate interest in AMEEP. The objective is to generate high-volume outreach impressions and referrals using existing communication platforms (Table 3).

Table 3. Outreach & Awareness Key Activities with Description and Payment Terms

Key Activity	Description of Work	Payment Terms
Sign-on Bonus	Payment received after signing agreement and attending CBO Cohort orientation in Q1	\$5,000 ⁹
E-blasts and Newsletters	Send up to 8 e-blasts or newsletters ¹⁰ that advertise or highlight AMEEP a year and share out any reported leads from outbound messaging	\$300 each (max \$2,400)
Host webinar or table at event to promote AMEEP	Host a webinar on AMEEP or table at an event related to Affordable Housing and share information about the AMEEP program up to 5 times	\$1,500 each (max \$7,500)
Lead converted to project Sold	Share leads generated through e-blasts, newsletters, webinars or events to confirm conversion to project; paid once project is Sold (up to 60 leads)	\$250 each (max \$15,000)

Application Support

CBOs will actively solicit leads and support customers and contractors through the sales and pre-inspection process. The objective is to generate early-stage pipeline for the program (Table 4).

Table 4. Application Support Key Activities with Description and Payment Terms

Key Activity	Description of Work	Payment Terms
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⁹ CBOs will receive one sign-on bonus of \$5,000 in total across scope of work in 2026 whether the CBO enrolls in one or two tiers of AMEEP engagement activities.

¹⁰ E-blasts and newsletters are distributed to at least 200 unique contacts. This threshold was established to ensure that the time CBOs invest in developing digital outreach materials—such as newsletters and email campaigns—reaches a sufficiently broad audience to justify the effort and maximize impact.

Sign-on Bonus	Payment received after signing agreement and attending CBO Cohort orientation in Q1	\$5,000
Lead converted to comprehensive project Committed	Share leads generated through e-blasts, newsletters, webinars or events to confirm conversion to project (up to 30); paid once project is Committed	\$500 (max \$15,000)
Weatherization Assistance Project layered with Comprehensive; Committed	Share WAP pipeline of projects to confirm conversion to comprehensive project (up to 20); paid once project is Committed	\$500 (max \$10,000)
Lead converted to AMEEP-E project Committed	Share leads generated through e-blasts, newsletters, webinars or events to confirm conversion to project (up to 10); paid once project is Committed	\$1,000 (max \$10,000)

Final key activity selections for both Outreach & Awareness and Application Support will be determined through preliminary scoping discussions with CBOs and KC3. The program's maximum compensation per CBO for this pilot year is \$50,000, where CBOs will participate in the program on receiving payment monthly along with CBO monthly reporting as deliverables are completed. Deliverable tracking methods for associated key activities will be finalized during scoping with KC3 and will include the following key activity support documents for activity verification to confirm the tasks were completed (Table 5).

Table 5. CBO Tracking Methods for Key Activities

Tier	CBO Key Activities	Verification Metrics
Outreach & Awareness	Sign-On Bonus: Payment received after signing agreement and attending CBO Cohort orientation in Q1	Finalized countersigned Participation Agreement & Attendance at In-Person Orientation
	E-blasts & Newsletters	Copy of E-Blast/Newsletter with contact list, campaign confirmation w/ receipts
	Table & In-Person Events	Log of AMEEP events, sign-in sheets, list of collateral shared, photos during events (where possible)
	Webinars	Webinar registration confirmation with registrants & attendees, confirmation of webinar AMEEP information shared (e.g., slides, other materials), photos/screenshots during events (where possible)
	Leads converted to Sold	Complete AMEEP application package submitted

Application Support	Sign-On Bonus: Payment received after signing agreement and attending CBO Cohort orientation in Q1	Finalized countersigned Participation Agreement & Attendance at In-Person Orientation
	Non-Comprehensive: Projects Committed	Complete AMEEP application package and copy of applicable documentation
	Comprehensive: Projects Committed	Complete AMEEP application package and copy of applicable documentation
	Weatherization Assistance Project (layered with Comprehensive): Projects Committed	Complete AMEEP application package and copy of applicable documentation; complete WAP application package
	AMEEP-E: Projects Committed	Complete AMEEP application package and copy of applicable documentation

CBO Multifamily Partner Deployment

The CBO engagement timeline outlines the key tasks and decision points required to support effective outreach, onboarding, and the transition to AMEEP lead generation and intake (Figure 3). KC3 initiated early engagement with potential CBO partners in late 2025 through direct outreach, including phone calls and emails, to introduce the opportunity to support AMEEP and assess interest. In parallel, KC3 developed and promoted an online survey via social media platforms (e.g., LinkedIn, Instagram) to gather initial feedback and expressions of interest from community-based organizations.

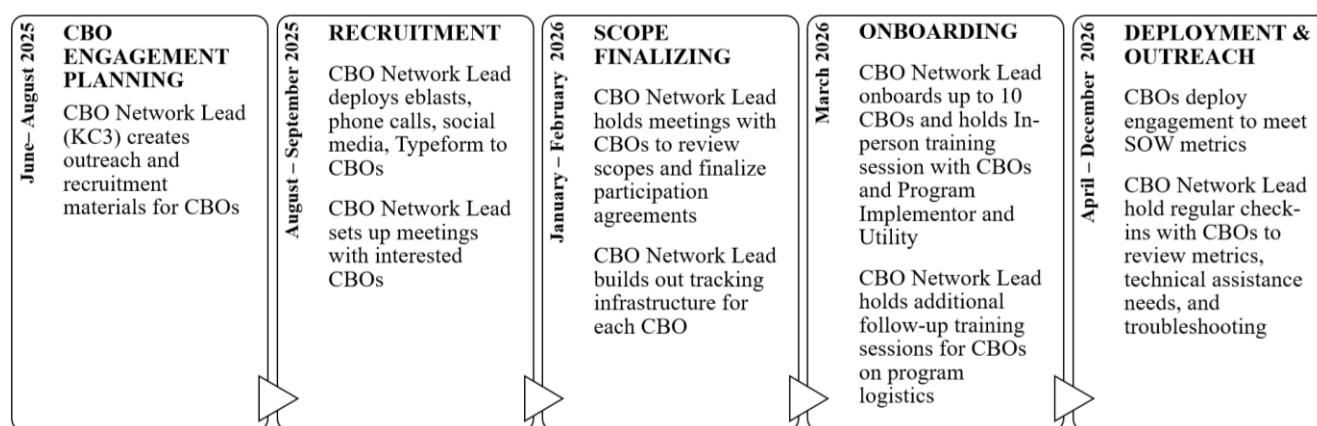


Figure 3. CBO Multifamily Partner Program Timeline

In Q1 2026, KC3 focused on follow-up recruitment meetings to refine scopes of work and finalize participation agreements with interested CBOs. During this period, KC3 also began building the tracking infrastructure needed to support each CBO's finalized scope, ensuring systems were in place to monitor activities, metrics, and payments prior to program deployment.

To support successful implementation, KC3 and Willdan developed an AMEEP CBO Handbook to serve as a centralized technical assistance and reference resource for participating CBOs¹¹. This handbook includes outreach scripts, best practices for tabling and in-person or virtual events, application support guidance, sign-in templates, presentation decks, program fact sheets, sample newsletter and e-blast language, and high-level information on financing resources and program stacking opportunities available to eligible affordable housing buildings.

KC3 recruited CBOs, including one WAP provider. Integrating a WAP provider into the cohort creates an opportunity to better understand how AMEEP and WAP can be coordinated, allowing building stakeholders to maximize incentives and determine the most appropriate pathway when project scopes overlap.

Following contracting and onboarding, KC3, Con Edison, and Willdan will host an in-person kick-off training and meet-and-greet for participating CBOs. This session will provide an overview of AMEEP, introduce outreach tools and best practices, and allow CBOs to build connections with one another. KC3 will then conduct tailored one-on-one onboarding sessions with each CBO to review scope-specific activities, delivery expectations, and tracking requirements. Optional office hours will be offered to create space for peer learning, troubleshooting, and shared discussion of challenges and opportunities identified through outreach.

From April through December 2026, CBOs will actively carry out their scoped activities. To maintain momentum and provide ongoing support, KC3 will hold regular check-ins with CBO partners—ranging from weekly to monthly depending on scope and support needs—to review progress, address technical assistance needs, and troubleshoot issues related to outreach and enrollment. CBOs were contracted on a first-come, first-served basis to ensure timely onboarding and allow for an April program launch, maximizing the duration of CBO engagement and impact during the 2026 program year.

Key Findings

Key Themes from CBOs Engaged on AMEEP

Feedback gathered through the pilot phase of CBO engagement highlighted several consistent themes that can inform future engagement design and implementation. Overall, CBOs emphasized the importance of integration, realistic compensation, access to financing resources, and clearer coordination with complementary programs such as WAP. Through prior engagement with CBOs supporting AMEEP and related energy efficiency initiatives, several recurring themes have emerged that highlight opportunities to strengthen program delivery, outreach, and participant experience.

Integrating AMEEP into existing CBO workflows. CBOs consistently noted that AMEEP engagement is most effective when it aligns with their existing programs and outreach channels rather than being treated as a standalone effort. Organizations with established newsletters, email campaigns, and recurring webinars indicated that incorporating AMEEP content into these

¹¹ The AMEEP CBO Handbook: Technical Guide for CBO Outreach, Referral, & Enrollment Support for NYS AMEEP (Downstate) April 2026 is available from KC3 upon request.

existing activities is far more feasible than creating entirely new outreach events. Leveraging current CBO infrastructure reduces burden on staff and increases the likelihood that AMEEP information reaches community members in trusted, familiar formats.

Level of effort and compensation beyond application submission. Several CBOs raised concerns that current compensation levels for projects reaching Sold and Committed milestones may not fully reflect the level of coordination required beyond the application stage. Moving projects forward often involves sustained follow-up with building representatives, troubleshooting, and additional administrative support. To address this, the CBO engagement model shifts post-lead generation responsibilities to KC3, allowing CBOs to focus on outreach and early-stage education while KC3 supports later-stage activities such as contractor coordination, bid procurement, and scope development.

Financing access is critical for successful enrollment. CBOs emphasized that providing AMEEP incentives alone is often insufficient to move projects forward, as most affordable housing buildings require additional capital to cover remaining costs. As a result, CBOs stressed the importance of pairing AMEEP outreach with clear, accessible financing and lending resources. In response, KC3 will develop fact sheets and handouts for CBOs outlining available financing options tailored to both small-scale and comprehensive multifamily projects. Given that many traditional lenders are hesitant to work with affordable housing due to existing debt burdens, KC3 will prioritize resources from lenders and institutions that specialize in affordable housing-friendly financing structures.

Clarifying the role of WAP and exploring alternative coordination models. Engagement with WAP providers revealed both opportunities and challenges. While WAP and AMEEP generally cannot fund the same energy measures, they can be strategically combined across different measures to maximize overall incentives for a building. However, many WAP providers reported limited familiarity with AMEEP and initially assumed the programs could be stacked on the same scope items. Additionally, WAP providers noted that current AMEEP payment terms are not competitive with WAP compensation structures, making direct participation less feasible. Based on this feedback, KC3, working with Willdan and Con Edison, may explore alternative engagement pathways, such as compensating WAP providers for advisory roles, participation in stakeholder meetings, or coordination support to help align WAP and AMEEP scopes more effectively.

Trusted partnerships and accessible communications drive enrollment. Strong marketing and trusted CBO partnerships are essential to maximizing AMEEP's impact in disadvantaged communities. CBOs consistently emphasized that accessible, language-inclusive, and jargon-free materials are critical for engaging affordable housing stakeholders, particularly in buildings where residents speak languages other than English or are unfamiliar with energy efficiency terminology. Clear, plain-language collateral paired with trusted messengers has proven effective in generating interest and increasing applications.

CBOs also highlighted the importance of diversified outreach strategies. In addition to traditional digital communications, broader audience engagement through physical mailings, in-person assistance, and mobile-based platforms (e.g., text messaging and WhatsApp) can help reach communities with limited access to technology or those who prefer informal

communication channels (Wagner 2019). These channels also provide a high-reach, low-cost, and accessible channel that aligns with daily technology usage and read and responded to at the recipient's convenience (Cordel et al. 2019). Leveraging CBOs' established communication networks strengthens both reach and trust.

Dedicated case management and consistent points of contact improve participant

Experience. Affordable housing buildings often lack the internal capacity to navigate complex program requirements, documentation processes, and contractor coordination. CBOs emphasized the value of consistent, centralized support, whether through KC3, CBO partners, or designated program contacts, to help participants move from application through construction and project close-out. Having a reliable, accessible point of contact serves as a “one-stop shop” for building representatives, reducing confusion and improving overall program experience. Case management and technical guidance provided by KC3 and CBO partners help maintain transparency, address questions in real time, and prevent projects from stalling due to administrative barriers.

Financial structure and incentive timing influence participation. CBO feedback reinforced that adequate incentive funding and thoughtful payment structures are critical for LMI buildings. Many energy efficiency programs provide incentives only upon project completion, which can create cash flow challenges for affordable housing owners. Providing incremental or milestone-based incentive payments, particularly before or during installation, can reduce upfront financial strain and lower participation barriers. AMEEP's existing framework offers opportunities to support this approach and can be further leveraged to address affordability constraints.

Contractor support and program infrastructure strengthen outcomes. CBOs and market partners also noted that investing in contractor training, onboarding, and technical guidance improves project success rates. Energy efficiency programs often require extensive documentation and enrollment steps for contractors, which can deter new participants and create bottlenecks. Supporting both new and experienced contractors through training, evaluation, and clearer program processes can enhance transparency and streamline project delivery across partners. There is an opportunity to leverage CBOs with AMEEP experience and workforce development expertise to support contractor onboarding and technical assistance.

Streamlining Contractor Procurement Through Digital Process. To improve the efficiency and transparency of contractor engagement, AMEEP is exploring the deployment of a contractor Request for Proposals (RFP) functionality within the Momentum¹² platform developed by Cadence OneFive¹³. This feature would allow program participants to quickly generate standardized requests for proposals for energy conservation measures from the tool's user-friendly scope-builder, and submit the RFPs directly to approved program contractors. Contractors would be able to access a centralized interface to view incoming project

¹² Momentum is a custom-built online platform designed to support multifamily building decarbonization by enabling users to generate preliminary retrofit scopes, streamline contractor bidding processes, identify available financial incentives, and optimize capital allocation across individual buildings and portfolios.

¹³ Cadence OneFive is a public benefit corporation that advances decarbonization and climate-resilient retrofits of existing multifamily buildings by providing building science expertise, decarbonization planning, and market transformation insights aimed at making retrofits faster, more affordable, and more accessible.

opportunities and submit bids or responses through the same platform. By digitizing and standardizing this procurement workflow, the proposed functionality is intended to reduce administrative burden, improve visibility into project opportunities, and shorten the time required for both customers and contractors to complete the bidding process. In doing so, the system aims to streamline contractor selection, improve responsiveness from participating contractors, and reduce the time and effort currently associated with managing proposal requests through more manual or fragmented processes. Tools such as Momentum can help streamline the transition from community-based outreach to project implementation. As CBO networks identify and engage interested multifamily buildings, a centralized platform for submitting and responding to standardized requests for proposals can simplify the procurement process for building owners while helping CBOs move projects more efficiently through the program pipeline.

CBO pilot structure to be adapted across other utility programs. The CBO engagement on AMEEP demonstrates that CBOs can play a critical role in expanding participation in energy efficiency programs within affordable multifamily housing. Through this pilot, CBOs reinforced that structured, compensated partnerships are essential to reaching underserved communities and should serve as a model for other energy efficiency and clean energy initiatives.

The CBO engagement framework leveraged by this pilot offers a replicable structure that utilities and program administrators in other states can adapt to increase equitable participation in multifamily programs. While regulatory environments, incentive levels, and housing markets may vary, the core components of this model are transferable: matching CBO capacity and interests to program activities, tiered compensation aligned with milestone achievement, centralized case management to reduce administrative burden on community partners, and coordinated alignment with complementary programs to maximize available funding. By formalizing and investing in community-based engagement, this approach provides a scalable pathway to advance equitable decarbonization efforts nationwide.

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