

Working Group Series for Participating Contractors and Industry Partners

Session #12 | April 14, 2022 8:30am-10:00am

Agenda

- Meeting Procedures
- Welcome
- Safety Message
- Joint Management Committee (JMC) update and discussion
 - Con Edison Residential Clean Heat Process
 - Online Intake Tool (OIT) Improvements Status Update
 - Presentation from TRC on Clean Heat Connect and QA Best Practices
 - Cadence of Future Meetings
- Stakeholder Presentations
 - No submissions provided this month
- Resources, support, and next steps

Welcome

- Program representatives on the call today:
 - JMC Co-Chairs: Mark Bremer (National Grid), Will Xia (NYSERDA)
 - JMC Members: Ray Cotto (Central Hudson), Steve Coulter (Con Edison), Jennifer Cross (National Grid), Nicole Williams (NYSEG, RG&E), Mark Maloney (Orange & Rockland)
 - Implementation Team (ICF): Mike L'Ecuyer
 - Working Group Support Team (Concentric Energy Advisors): Ben Davis, Pieter Zwart, Clara-Ann Joyce

Working Group Series: Review of Typical Meeting Format

- As outlined in previous meetings, the intent of this Working Group Series is to create a forum for working meetings between participating contractors, industry partners, and other stakeholders with the NYS Clean Heat Program Administrators.
 - Emphasis is on the “working group” nature of these calls, with focus on clarifying issues, pain points, affected parties, and proposed solutions
- The JMC wants to promote dialogue and discussion with a focus on transparency and communication
 - The intent is to drive toward solution development
 - Emphasis here is on open communication with the industry. The JMC does want this to be a two-way process in terms of flagging and communicating issues.
- The hope is to have stakeholder-led presentations of pre-submitted topics in addition to updates from the JMC on topics discussed in previous sessions

Safety Message

- While doing your spring cleaning this year, keep the following safety tips in mind:

- Be sure to wear a mask when cleaning dusty areas
- Be careful when working on wet or slick surfaces, especially if working on ladders or other elevated equipment
- Be aware of stinging bugs and insects that come out with the warmer weather

Con Edison Residential Clean Heat Process

- Con Edison is reviewing residential projects in Categories 2, 2a, and 2b to check for appropriate sizing of systems and accurate reporting in Manual J paperwork
- Contractors may have seen some delays in receiving invoices. An announcement was made in a letter to contractors sent out on April 11.
 - For contractors whose projects require additional review, partial payments will be issued beginning on April 21
 - The vast majority of projects do not require additional review – those payments will be issued beginning today, April 14
- For projects requiring additional review: to receive additional payments, contractors are asked to submit a completed Manual J report and completed Manual J data table (both attached to the April 11 letter) within 60 days
 - Whenever a partial payment is sent, ICF will alert the contractor and send over the data table
 - After review, if it is determined that the project is appropriately sized and everything is completed and accurate, Con Edison will issue the incentive amount determined at the outset of the project
 - If the project is not appropriately sized or documentation is incomplete, Con Edison will ask for a revised application

OIT Improvements Status Update

- A number of items were completed in 2021 and early 2022 sprints as listed in the presentation slides
- Some new requests for updates took precedent, especially additions for Manual J-related data
- The larger unification of the OIT across utilities is targeted for Fall 2022 in alignment with the 9/1 program change implementation date
- Additional items for the current 5/1 sprint and beyond are listed in a table in the presentation slides

Clean Heat Connect & Common QA Items

- A representative from TRC joined the call today to introduce the Clean Heat Connect initiative and to speak about some common field assessment best practices
- Clean Heat Connect is a NYSERDA-led initiative that has coordinated with a group of Clean Heat distributors to provide resources for accelerating workforce training and expanding the heat pump market
- The website is now live: CleanHeatConnect.ny.gov
 - The website includes resources for installers, distributors, and consumers. It also includes some resources that have already been distributed to the market.

- Two featured items:
 - NEEP sizing and design tool
 - Home archetype maps: 1-2 page quick application guides for installers and agents in the field

Field Assessment Best Practices

- Field assessments are conducted using a 23-point standardized checklist available online
- Projects are selected for assessment based on sampling criteria, which includes building type and utility service territory, among other things
 - The goal of assessment is to make sure heat pumps are installed correctly and functioning properly for the homeowner. It is not meant to be punitive for the contractor.
 - TRC conducts ride-alongs where, with the homeowner’s permission, contractors can join the inspector in the field
- A few new resources are available to guide best practices:
 - Acceptable Practices for Correcting and Avoiding ASHP Non-Conformances
 - This document was developed by ICF and walks through what installers can do to avoid nonconformances in their assessment
 - It also outlines what needs to be done if a nonconformance is issued
 - ASHP Field Assessment Hot List
 - This one-page sheet visually shows the “top 10” field assessment items and how to best address them. This includes:
 - Outdoor unit snow protection from above
 - Indoor/outdoor unit clearances
 - Refrigerant line set insulation and UV protection
- Assessment best practices:
 - Refrigerant Line protection: All refrigerant lines must be insulated fully. This means no gaps in insulation, the line is not being compressed in such a way that the insulation doesn’t work, and outdoor lines have UV protection, since insulation material will break down quickly when exposed to UV.
 - Inspectors also look inside the house
 - The hardest part for inspectors is confirming the difference between a UV-protected product and non-UV protected. Contractors are asked to indicate this on their application, especially if they are not using a product that is marked as UV-protected, to avoid a false negative on their assessment.
 - Checklist item C10 indicates major gaps in insulation (more than 12”), both indoor and outdoor
 - There are some exceptions for full home centrally ducted systems that include an expansion valve inside, so the liquid line does not need to be insulated. TRC is trying to note down these products, but let your inspector know if it is marked incorrectly.
 - Checklist item C10B indicates minor gaps in insulation (1” to 12”) and is considered a minor nonconformance

- These gaps still need to be corrected. Installers are asked to get their crews in the habit of fully insulating refrigerant lines.
 - Photo examples of properly and improperly insulated refrigerant lines are included in the presentation slides
- Snow protection: Outdoor units must be protected from snow from both above and below
 - Checklist item C15 indicates insufficient snow protection from above
 - Make sure units are not on an eave end where snow can slide off the roof and pile up on the unit. Install units on a gable end where possible, or install a shield above the unit to deflect snow. Examples of these shields are shown in the presentation slides.
 - Checklist item C15B indicates insufficient snow protection from below
 - Units must be 6", 12", or 18" off the ground, depending on the location. This information is included in the calculator tool.
 - Get units up high on a stand, stilts, or a wall mount. Cinderblocks are acceptable as long as they are secure and stable and on a flat, stable surface.
 - Place units under a deck when possible (as long as there is still sufficient clearance for airflow)
 - Overall, the unit needs to be usable all winter long without having to be shoveled out
- Indoor unit clearances: Units must have sufficient clearances above, below, and on each side
 - Checklist item C14 indicates insufficient clearances above and below the unit and is considered a major nonconformance. Sufficient clearances are necessary for adequate airflow through the unit and for proper functioning.
 - Checklist item C14B indicates insufficient clearances on the sides of the unit and is considered a minor nonconformance. Side clearances are often needed to access service panels, and bounceback can sometimes occur, where airflow bouncing off the wall can fool the temperature sensors and cause the unit to short cycle.
 - Please note that sometimes the manufacturer's stated clearance is from the mounting brackets and not the casing
- Outdoor unit clearances: Outdoor units must have sufficient airflow to function.
 - Checklist item C13 indicates this item. If there are multiple units together, make sure they are far enough apart. If there is boxing around the unit to hide it, make sure it is fully louvered and/or provides enough airflow
- Other best practices are included in a hit list table in the presentation slides
- Some additional metrics on frequencies of these nonconformances are included in the slides
 - By far, minor nonconformances on refrigerant line insulation is the most common

Verbal Question – Gree Mechanical

- Our organization is interested as a brand in the marketplace and would like to become a partner. We were not previously aware of the Clean Heat Connect partnership and would like to be involved.
- **Response:** Please contact Matt Christie at TRC to join. This is an open participation group.

JMC Updates

- The JMC proposes to shift PC&IP meeting cadences from monthly to quarterly, with meetings scheduled in early June, September, January, and March to align with future program announcements and updates
- This would allow stakeholders more time to prepare topics and engage with the JMC on potential topics for discussion

Resources, Support, and Next Steps

- The next PC&IP meeting will be on Thursday, June 9th (9:00-10:00am)
 - All program-related inquiries can be submitted to nyscleanheat@ceadvisors.com
 - All project-specific inquiries can be submitted to nyscleanheat@icf.com or 844-212-7823
- For project inquiries, the first step should be to contact your account manager at ICF. If the account manager does not respond within three days, please contact nyscleanheat@icf.com or reach out to the utility's Program Manager. Contact information is listed in the presentation slides.
- Materials from the meeting will be distributed via email. Links to helpful Program resource pages are included in the presentation slides as well.

The JMC thanks all attendees for their participation and engagement.