

NYS Clean Heat Working Group Series

for Participating Contractors & Industry Partners

Session #13

June 9, 2022 9:00 am–10:00 am

**NYS Clean Heat
Joint Management Committee**



NYS Clean Heat

Agenda

- > **Meeting procedures** (2m)
- > **Welcome** (2m)
- > **Safety Message** (2m)
- > **JMC updates and discussion**
 - Program Changes Announced on 6/1 (30m)
 - HPWH Midstream Incentive
 - Incentives for Decommissioning and Integrated Controls
 - National Grid Kicker for Gas-Constrained Areas
 - Incentive Caps
 - Preliminary Incentive Offer Letters
 - Online Intake Tool (OIT) Improvements Status Update (10m)
 - Updates to HPWH Checklist, GSHP QA Process (5m)
 - Clean Heat Connect updates (5m)
- > **Stakeholder Presentations**
- > **Resources, support, and next steps** (5m)

Meeting procedures

Before beginning, a few reminders:

- > **All attendees will be muted**
- > For questions or comments throughout, please use either the Raise Hand or Q&A functions
 - > Select the Raise Hand icon in the bottom toolbar, or hover your mouse over your name in the Attendees list in order to see the Raise Hand icon displayed
 - > When you have finished asking your question, select the Raise Hand icon again to lower your hand
- > If an attendee opts to use the Raise Hand function to ask a question or make a comment, the meeting moderator will call on that attendee and unmute individually
- > Q&A function is private – the team will share public responses as appropriate
- > Slides, notes, and a compilation of Q&As will be posted after the meeting
- > If technical issues arise, please contact NYSCleanHeat@ceadvisors.com



Welcome

Joint Management Committee (JMC) Co-Chairs:

- > **Mark Bremer**, National Grid
- > **Will Xia**, NYSERDA

> Other JMC Members:

- **Ray Cotto**: Central Hudson
- **Toby Hyde**: Con Edison
- **Jennifer Cross**: National Grid
- **Nicole Williams**: NYSEG, RG&E
- **Mark Maloney**: Orange & Rockland

> Our implementation team today:

- **Kenn Latal**: ICF

> Our Working Group support team:

- **Ben Davis**: Concentric
- **Pieter Zwart**: Concentric
- **Clara-Ann Joyce**: Concentric

Working Group Series

Review of typical meeting format

- > **Working meetings between Participating Contractors, industry partners, and other stakeholders with the NYS Clean Heat Program Administrators**
- > To foster:
 - Transparency
 - Coordination and communication
 - Prioritization
 - Solution development

Working Group Series

Review of typical meeting format

- > **Updates on previous topics** (various)
- > **Stakeholder presentations (None this session)**
 - Presentation (5m)
 - Discussion time will vary by topic (5-30m)

Safety Message: Pedestrian Safety Tips for Drivers

- Look out for and yield to pedestrians everywhere, at all times.
- Slow down and be prepared to stop when turning or otherwise entering a crosswalk.
- Stop well back from crosswalks to give other vehicles an opportunity to see the crossing pedestrians so they can stop too.
- Never pass vehicles stopped at a crosswalk. There may be people crossing where you can't see.
- Follow the speed limit, especially around people on the street, in school zones, and in neighborhoods where children are present.
- Be extra cautious when backing up and look for pedestrians.



Source: https://upload.wikimedia.org/wikipedia/commons/b/b0/2014-12-30_12_11_48_Crosswalk_sign_on_Metzger_Drive_at_the_College_of_New_Jersey_in_Ewing%2C_New_Jersey.JPG

Program Announcements from 6/1

- > Heat Pump Water Heater Midstream Incentive
 - All utilities will be adding a midstream distributor incentive for HPWHs.
- > Incentives for Decommissioning and Integrated Controls
 - All utilities in the state will offer incentives for decommissioning and integrated controls for full load residential systems as of September 1, 2022.
 - National Grid and NYSEG/RG&E will be adding incentives for Category 2A – Integrated Controls and Category 2B – Decommissioning.
 - Central Hudson will be adding an incentive for Category 2A – Integrated Controls.
- > Kicker for Gas-Constrained Areas
 - National Grid will be adding a kicker incentive for gas-constrained areas.

HPWH Distributor Incentive

- > To address existing barriers to increased adoption of HPWHs, a midstream program design will drive **increased stocking** and **market awareness** while making incentives easily accessible for all customers by moving the “paperwork” to distributors and retailers
 - All utilities in the state plan to adopt mid-stream incentive to drive distributors to sell and stock HPWH
 - Inspired in part by successful pilot program at Central Hudson
 - The midstream incentive supplements the existing option in place for self-installed units

HPWH Incentive Design

> Eligibility

- Covered equipment: Air-to-Water HPWHs with storage capacities up to 120 gallons must meet or exceed Energy Star Residential Water Heater specification (**no change from current Program Manual**)
- HPWH Installation: contractors are not required to submit a Contractor Participation Agreement, but must be NYS licensed and site owners may install their own HPWH (**no change from current Program Manual**)
 - Distributors and retailers will be required to sign a participation agreement
- Allow all customer segments to receive the midstream incentive

> Structure

Wholesale Market

- Enroll distributors
- \$/unit customer rebate + \$/unit distributor reward + \$/unit contractor reward
- Contractor reward & customer incentive are passed through at time of purchase
- Distributor submits application with installation and equipment info, and receives payment
- Customer completes acknowledgement of terms & conditions

Retail Market

- Enroll retailers
- \$/unit customer rebate + \$/unit retailer reward
- Customer completes online form for instant rebate
- Retailer submits sales data and receives payment

Statewide Adoption of Category 2a & 2b Incentives

- > On September 1, incentives for full load cold climate ASHP with integrated controls (2a) and full load cold climate ASHP with decommissioning (2b) will be offered statewide

Category	Central Hudson	Con Edison	National Grid	NYSEG/RG&E	O&R
2 – Full load ccASHP	Currently offered	On Pause	Currently offered	Currently offered	Currently offered
2a – Full load with integrated controls	Coming Sept 1	On Pause	Coming Sept 1	Coming Sept 1	Currently offered
2b – Full load with decommissioning	Currently offered	On Pause	Coming Sept 1	Coming Sept 1	Currently offered

NYS Clean Heat Program Incentive Changes Announced June 1, 2022

Central Hudson					Participating Contractor Reward ¹		Distributor Reward ³	
Category	Description	Total Incentives			Current	Effective 9/1/2022	Current	Effective 9/1/2022
		Current	Effective 9/1/2022	Unit				
2	ccASHP: Full Load Heating	\$500	\$500	\$/10,000 Btu/h	\$300/Project	\$300/Project	-	
2a	ccASHP: Full Load Heating with Integrated Controls	-	\$700	\$/10,000 Btu/h	\$500/Project	\$500/Project	-	
2b	ccASHP: Full Load Heating with Decommissioning	\$1,000	\$1,000	\$/10,000 Btu/h	\$500/Project	\$500/Project	-	
5	HPWH midstream *same customer incentive as retail \$1,000 – total incentive for midstream is \$1,100 to account for rewards		\$1,100*	\$/Unit	-	\$50/Unit ²	\$50	\$50/Unit

Incentive Change
No Change

National Grid					Participating Contractor Reward ¹		Distributor Reward ³	
Category	Description	Total Incentives			Current	Effective 9/1/2022	Current	Effective 9/1/2022
		Current	Effective 9/1/2022	Unit				
2	ccASHP: Full Load Heating ²	\$1,000	\$1,000	\$/10,000 Btu/h	\$500/Project	\$500/Project	-	-
2a	ccASHP: Full Load Heating with Integrated Controls	-	\$1,200	\$/10,000 Btu/h	-	\$500/Project	-	-
2b	ccASHP: Full Load Heating with Decommissioning	-	\$1,400	\$/10,000 Btu/h	-	\$500/Project	-	-
	Kickers for constrained areas		Additional 25%	%/Project	-	-	-	-
5	HPWH midstream *same customer incentive as retail \$700 – total incentive for midstream is \$800 to account for rewards		\$800*	\$/Unit	-	\$50/Unit ²	-	\$50/Unit

¹ A portion of the total incentive that may be retained by the Participating Contractor

² Contractors who receive this reward are not required to be Clean Heat Participating Contractors

³ A portion of the total incentive that may be retained by the distributor

NYS Clean Heat Program Incentive Changes Announced June 1, 2022

NYSEG/RG&E

Category	Description	Total Incentives			Participating Contractor Reward ¹		Distributor Reward ³	
		Current	Effective 9/1/2022	Unit	Current	Effective 9/1/2022	Current	Effective 9/1/2022
2	ccASHP: Full Load Heating ²	\$1,000	\$1,000	\$/10,000 Btu/h	\$500/Project	\$500/Project	-	-
2a	ccASHP: Full Load Heating with Integrated Controls	-	\$1,200	\$/10,000 Btu/h	-	\$500/Project	-	-
2b	ccASHP: Full Load Heating with Decommissioning	-	\$1,400	\$/10,000 Btu/h	-	\$500/Project	-	-
5	HPWH midstream *same customer incentive as retail \$700 – total incentive for midstream is \$800 to account for rewards		\$800*		-	\$50/Unit ²	-	\$50/Unit

Incentive Change
No Change

Orange & Rockland

Category	Description	Total Incentives			Participating Contractor Reward ¹		Distributor Reward ³	
		Current	Effective 9/1/2022	Unit	Current	Effective 9/1/2022	Current	Effective 9/1/2022
2	ccASHP: Full Load Heating	\$700	\$700	\$/10,000 Btu/h	\$500/Project	\$500/Project	-	-
2a	ccASHP: Full Load Heating with Integrated Controls	\$1,200	\$1,200	\$/10,000 Btu/h	\$750/Project	\$750/Project	-	-
2b	ccASHP: Full Load Heating with Decommissioning	\$1,800	\$1,800	\$/10,000 Btu/h	\$1,000/Project	\$1,000/Project	-	-
5	HPWH midstream *same customer incentive as retail \$1,000 – total incentive for midstream is \$1,100 to account for rewards		\$1,100*	\$/Unit		\$50/Unit ²	-	\$50/Unit

¹ A portion of the total incentive that may be retained by the Participating Contractor

² Contractors who receive this reward are not required to be Clean Heat Participating Contractors

³ A portion of the total incentive that may be retained by the distributor

Kicker for Gas-Constrained Areas

- National Grid will be adding a 25% kicker incentive for 53 gas-constrained zip codes in eastern and central regions.
- Details will be emailed to National Grid Participating Contractors.

Program Announcements from 6/1

> Incentive Limitations

- For all projects, incentives will be limited to 70% of project costs.
- A \$1 million “soft” cap for incentives will be specified in the Program Manual. For projects that request incentives above \$1 million, the utility reserves the right to limit incentives to \$1 million or offer incentives at a custom rate.
- Ground source projects in residential Category 3 will be offered incentives up to \$50,000.

> Preliminary Incentive Offer Letter (PIOL)

- Utilities will be including a default incentive expiration date in the PIOL for non-residential projects. An applicant may request the utility's approval for an extension and adjustments may be made on a case-by-case basis.

> Non-residential refinements

- Utilities may adjust incentive levels to differentiate projects in new construction versus existing buildings with specific incentive levels by heat pump technology.

Online Intake Tool (OIT) Improvements Status Update

Previous sprint items completed in 2021 and 2022

- > 2021: Filtering on dashboard, exporting data, adjusting columns, premise info in emails, deploy text messages, coordination of messaging with OIT changes, HPWH OIT alternatives, status glossary, tips on fields, aging of current status
- > January 2022
 - Added fields for Con Edison and ORU Category 2A and 2B; fields for NYSEG and RG&E special LMI projects
 - Added a note/comment field for contractors to fill out on new applications, as requested
- > March 2022
 - Smarter existing equipment type entries, based on fuel type
 - Make column for project number wide enough in default view
 - Developed report providing total project aging
- > Acceleration of OIT harmonization for Fall 2022 had to accommodate new requests
 - Con Edison request for some new fields to collect Manual J-related data
 - Deploying ability for contractors to check all equipment model and serial numbers in an application prior to submission
 - New URL purchased for one landing page
 - Reviewing bulk upload capabilities to include for all utilities
 - Changes announced for 9/1 may affect OIT inputs somewhat – still TBD

OIT Improvements Schedule

Improvement	Feasibility	Notes	ETA
Add Manual J-related fields	High	New fields to assist with review of Manual J analyses – total and conditioned square foot, previously unconditioned spaces, heating loss, infiltration rate (Con Edison)	6/9/2022
Make versions of OIT more identical (<u>interim</u>)	High	Harmonize order of fields – the practical solution for this stage is order of fields for required attachments	5/1/2022
Include equipment model and serial number for contractor to check before submitting	High	Developed ability to generate the data that was input, including serial and model number as interim solution	6/9/2022
Cloning Measures	High	Investigating development of cloning equipment requiring only serial numbers for the cloned equipment	9/30/2022
Make all versions of OIT identical	High	Longer term: common OIT platform, degree of harmonization contingent on JMC program design harmonization	9/30/2022
Deploy bulk upload tool like the one deployed for Con Ed	High	The OIT bulk upload tool is complex b/c of attachment capability - requires one OIT platform.	9/30/2022

Updates to HPWH Checklist Item C4

- > Originally reviewed Pressure relief valve, Thermostatic mixing valve, and Cold water pressure regulating valve
- > Removed: Thermostatic mixing valve
 - Not applicable to HPWH as HPWHs maintain temperature and do not reach 140°F to serve space heating
- > Removed: Cold water pressure regulating valves
 - Conditional code item based on locale. Not fit for program-wide enforcement.
- > New language: “Verify temperature and pressure relief valve are installed and that the relief valve terminates within 6" of the floor.”










GSHP QA Update

- > 12/1/2021 OIT update to receive design and startup checklist documents during application submission
- > As of 6/1/2022, projects without these documents will not pass onsite QA assessment
 - Bore-well/loop-field design documents
 - Startup/decommissioning checklist
- > Documents reviewed during post-installation onsite QA assessment
- > No additional processing time during rebate application review

Cold-Climate ASHP Sizing Design Trainings

- > Curriculum developed by NYSERDA in 2019. Details here: <https://www.nysERDA.ny.gov/All-Programs/Clean-Energy-Workforce-Development/Clean-Energy-Training-Resources>
- > Required for all *new* NYS Clean Heat participating contractors starting Jan 1, 2022
- > Anticipated that NYS Clean Heat will require the training for *existing* contractors too starting Jan 1, 2023
- > Covers the following 6 chapters:
 - Basic Principles of ASHP and VCHP Operation
 - Load Calculations
 - System Sizing and Specification
 - System Design Options/Considerations (Applications)
 - Thermostats and Controls
 - Recommended Practice Design Examples
- > Offered / Available through ***distributors and manufacturers***
 - *Not available through NYS Clean Heat program administrators or NYSERDA*
 - *Check with your distributor or preferred manufacturer first to learn of offerings*
- > In the first quarter – trainings were delivered to ~800 known attendees (some beyond NY state)

ccASHP Sizing Design Training – Known Offerings

Offering Entity	Delivery Mechanism	Date(s)	Locations	Notes
ABCO/ Daikin  	In person	None currently scheduled	ABCO Training Centers	Request from ABCO
Emerson Swan/ Haier 	In person	None currently scheduled	At requesting distributor/ contractor site	Schedule one via distributors/ contractor
Fujitsu via reps   	In person	July 13 – 8:30-11:30 TBD early Sept	Raynham MA Syracuse NY (TBD)	Monitor SRGI's training calendar for updates: https://srgirep.com/events/
LG 	In person	None currently scheduled	Klima, VP Supply, Meier Supply	Could be available at other distributors upon request
Mitsubishi 	On demand	(anticipated by June 20)	Mitsubishi's Contractor Portal LMS	https://meushvac.force.com/Contractor/s/
Samsung 	On demand	Now	Samsung's LMS	1. Register for an account 2. Sign up for training
Others – unknown	<i>Contact your distributor and manufacturer</i>			

Reminder: Change in Meeting Cadence

- > The JMC has moved PC&IP meeting cadence to quarterly, with meetings scheduled in early June, September, January and March.
 - Aligns with future program announcements and updates moving forward
 - Continuous feedback is still encouraged through program representatives and NYS Clean Heat email inboxes
 - Lengthening time between meetings will allow stakeholders more time to prepare topics and engage with the JMC on potential topics for discussion
- > The JMC expects to increase engagement and outreach with small groups to align on potential program adjustments and additional feedback from the industry

Resources, support, and next steps

- > Next PC&IP meeting on **September 8th, 2022** (9:00 AM-10 AM)
 - Please submit potential topics for the next Working Group by **September 1st** via email to NYSCleanHeat@ceadvisors.com or directly to your utility partner.
- > **Email blasts** – twice per quarter
 1. Early week following Working Group: next steps, including slides, meeting notes and Q&A
 2. Week prior to meeting: Agenda items and report-out on prior items
- > NYSCleanHeat@ceadvisors.com – for *program*-related inquiries
- > NYSCleanHeat@icf.com and (844) 212-7823 for *project*-related inquiries
- > NYS Clean Heat Website - (<https://saveenergy.ny.gov/NYScleanheat/resources/>)

NYS Clean Heat Project Status Inquiry Process

Project inquiries

1. Contractor reaches out to their dedicated account manager (AM) for issue resolution first
2. If the AM does not respond within three days, contact NYSCleanHeat@icf.com or the Utility Program Manager as listed below. These Program Managers work for their respective utilities, which have contracted with ICF to handle applications.

Utility Program Manager contacts

- > **Central Hudson:** Ray Cotto, Assoc. Energy Efficiency Program Manager
Phone: (845) 486-5750, Email: RCotto@cenhud.com
- > **Con Ed:** Toby Hyde, Program Manager, Phone: (917) 565-6911, Email: hydett@coned.com, Dan Krupa, Sr. Specialist, Phone: (917) 509-8631, Email: krupad@coned.com
- > **National Grid:** Jennifer Cross, Senior Program Manager
518-433-5034, Email: Jennifer.Cross@nationalgrid.com
- > **NYSEG/RG&E:** Nicole Williams - Program Manager, Conservation and Load Management
Phone: 585-484-6592, Email: nicole.williams@nyseg.com
- > **Orange & Rockland:** Mark Maloney Phone: (845) 577-2368, Email: maloneym@oru.com

Additional Resources

> Co-chair contacts

- **Mark Bremer**, National Grid: Phone: (315) 440-1770 (m), Email: mark.bremer@nationalgrid.com
- **Will Xia**, NYSERDA: Phone: (332) 323-8368 (m) , Email: William.Xia@nyserda.ny.gov

> All program documents are located on the NYS Clean Heat Resources page (<https://saveenergy.ny.gov/NYScleanheat/resources/>)

> All regulatory proceeding documents are located on the NYS DMM (<http://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=18-M-0084>)

> Additional program resources are available on the Clean Heat Connect website (<https://cleanheatconnect.ny.gov/>)

Thank you!

