

# Working Group Series for Participating Contractors and Industry Partners

## Session #18 | September 14, 2023 9:00am-10:00am

### Summary Report

*\*Note: This document is intended to be a supplement to the slide deck presented during the webinar on September 14<sup>th</sup> and posted to the Contractor Resources webpage.*

## Agenda

- Meeting Procedures
- Welcome
- Safety Message
- Joint Management Committee (JMC) updates and discussion
  - Reminders and announcements
  - Review of 9/1 Program Updates and New Resources
  - Heat Recovery Chillers and Heat Pump Chillers
  - Air-to-Water Heat Pumps
  - Changes and Updates from Con Edison
- Stakeholder Presentations
  - No submissions provided this quarter
- Resources, Support, and Next Steps

## Program Representatives

- JMC Co-Chairs: Julie Hawkins (National Grid), Will Xia (NYSERDA)
- JMC Members: Ray Cotto (Central Hudson), Toby Hyde (Con Edison), Jim MacMartin (National Grid), Nicole Williams (NYSEG, RG&E), Christopher Trenard (Orange & Rockland)
- Implementation Team (ICF): Kenn Latal, Tim Walsh
- Working Group Support Team (Concentric Energy Advisors): Ben Davis, Pieter Zwart, Clara-Ann Joyce

## Introduction

- 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.
- 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.

## JMC Updates – Key Takeaways

*The following section provides a summary of key points from the content presented by the JMC.*

## Reminders and Announcements

- Customers are not eligible to receive incentives for both heat pump and gas space heating equipment for the same project. Projects that are scoped to provide new gas space heating equipment as well as heat pumps may not apply for incentives in both programs.
- Systems that are sized for greater than 120% of BHL will incur additional review and require justification for oversizing.
- Additional School of Clean Heat training materials will be made available in the coming weeks on the Clean Heat Connect website: <https://cleanheatconnect.ny.gov/calendar/>
- Please make sure your contact information is up to date with the Program. Changes and updates can be submitted to [nyscleanheat@icf.com](mailto:nyscleanheat@icf.com).

## Review of 9/1 Program Changes and New Resources

- New Program Manuals for Con Edison and for Central Hudson, National Grid, NYSEG, O&R, and RG&E were released on 9/1 and are available on the Contractor Resources webpage: <https://cleanheat.ny.gov/contractor-resources>
  - These Program Manuals reflect several changes that were announced on 6/1, including incentive level changes for custom and prescriptive projects across the utilities.
    - All projects installed on or after the effective date of 9/1 will be subject to the new incentive amounts and caps. Projects installed prior to 9/1 have until 9/30 to submit applications to receive the pre-9/1 incentive amounts.
  - Category 1 partial load incentives are being phased out to focus on full load and maximum efficiency.
  - Category 9 simultaneous space and water heating incentives are also being discontinued. The HPWH incentive is still offered when qualifying equipment is purchased from a participating distributor. Customers and contractors may also receive the incentive through an instant discount program at participating Lowe's and Home Depot retailers.
  - For all projects, incentives will be capped at 50% of project costs. For custom projects, incentives will be capped at either 50% of project costs or a utility-specific cap, whichever is less.
  - New technologies eligible for custom incentives include heat recovery chillers (HRCs), heat pump chillers (HPCs), and dedicated outdoor air systems paired with a heat pump. Please see the Program Manuals for eligibility criteria and other details.
- New resources have been made available on the Contractor Resources webpage, including custom incentive calculators for Category 6 Domestic Hot Water and HRCs/HPCs, updated custom Category 4/4a and prescriptive calculators, the geothermal startup checklist, an updated decommissioning checklist, and updated utility "sell sheets"
  - Resources in development include a zip code lookup tool for determining design temperature locations and a load calculation guidance document

## Heat Recovery Chillers and Heat Pump Chillers

- HRCs and HPCs are technologies newly eligible for custom incentives in all service territories except RG&E
  - HRCs/HPCs must be electrically operated and adhere to specific efficiency thresholds based on ASHRAE Standard 90.1-2022

- Ground loop HPCs have requirements related to ISO 153256-1. Full details are included in the Program Manual.
- Especially since this is new equipment, contractors are encouraged to reach out to account managers and utility representatives for guidance or questions.

### **Air-to-Water Heat Pumps**

- AWHPs were added to the NYS Technical Resource Manual (TRM) in July 2023. This was a prerequisite for the Program to be able to include these as eligible technology.
- The Program Administrators are looking to launch incentives for AWHPs in Q1 2024. Behind the scenes, they have been working on eligibility requirements, incentive design and amounts, a qualified products list, qualifications such as training requirements, and data collection requirements.
  - Con Edison expects to launch incentives for AWHPs in Q4 of this year.

### **Updated Con Edison Clean Heat Offerings**

- Con Edison had previously announced increases to incentives across residential GSHP, Small and Medium Business, and Multifamily that went into effect on 7/12. Applications submitted prior to that date will not see the new amounts reflected.
  - A breakout of the incentive changes is included in the presentation slides and the updated Program Manual.
- Con Edison is offering added incentives for eligible projects within the Soundview area of the Bronx. Details are included in the updated Program Manual.
- Incentives for eligible HPWHs are now being offered directly to customers at the point of purchase at select retailers. Incentives had previously only been available through the distributor channel (and these are still available as well).
- A limited-time fall promotion was announced on August 21: ASHP decommissioning projects installed on or after 8/21 are eligible for increased incentive amounts during the promotion timeframe, which runs until 12/15. Additional details are included in the presentation slides.

## **Q&A**

*Questions were asked and responses given both verbally and through the written Q&A function.*

**Question:** Who develops the courses for the NYS Clean Heat contractor trainings?

**Response:** ICF develops and hosts the School of Clean Heat webinars that outline the program participation process. The ccASHP sizing and design trainings are hosted by manufacturers and developed following guidelines set by NYSERDA.

**Question:** Are heat recovery chillers currently eligible for industrial applications?

**Response:** At this time, incentives for HRCs and HPCs are designed for comfort heating applications. Please speak with your utility representative or account manager for more detailed information about your specific project.

**Question:** The new Con Edison Program Manual released on 9/1 includes information about AWHPs. Are they currently available for incentives in Con Edison service territory?

**Response:** Incentives for AWHPs in Con Edison service territory are not yet available and will be rolled out in Q4 of 2023.

**Question:** Do rooftop units (RTUs) qualify for air-source or ground-source incentives, and have any successfully received incentives from the program to date?

**Response:** There is no specific prohibition on RTUs. For specific equipment eligibility, please contact your account manager.

**Question:** When does the Con Edison fall promotion end?

**Response:** For the indicated project types, promotional incentive rates, which went live on August 21, will run through December 15.

**Question:** Where can we find out more information about Con Edison incentives for Category 5 HPWH?

**Response:** Incentives for HPWH are live and available both through the midstream distributor channel and the newly rolled out retail channel as well. Specific details are included in the Program Manual.

**Question:** Is there a maximum to the incentives that projects on commercial properties in Con Edison service territory can receive?

**Response:** Incentives for Con Edison C&I and Multifamily projects are capped at \$1 million. Con Edison SMB projects are capped at \$200,000.

## Resources, Support, and Next Steps

- The next PC&IP meeting is scheduled for Thursday, December 14<sup>th</sup> (9:00-10:00am)
  - All program-related inquiries can be submitted to [nyscleanheat@ceadvisors.com](mailto:nyscleanheat@ceadvisors.com)
  - All project-specific inquiries can be submitted to [nyscleanheat@icf.com](mailto: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](mailto:nyscleanheat@icf.com) or reach out to the utility's Program Manager. Contact information is listed in the presentation slides.
- Links to additional program resources are included in the presentation slides.

The JMC thanks all attendees for their participation and engagement.