

Working Group Series for Participating Contractors and Industry Partners

Session #20 | April 18, 2024 9:00am-10:00am

Summary Report

**Note: This document is intended to be a supplement to the slide deck presented during the webinar on April 18th and posted to the Contractor Resources webpage.*

Agenda

- Meeting Procedures
- Welcome
- Safety Message
- Joint Management Committee (JMC) updates and discussion
 - 3/1 Program Manual Updates
 - Additional Recent Filings
 - Installation Best Practices Case Studies
 - Upcoming Training Opportunities
- Stakeholder Presentations
 - No submissions provided this quarter
- Resources, Support, and Next Steps

Program Representatives

- JMC Co-Chairs: Ray Cotto (Central Hudson), Will Xia (NYSERDA)
- JMC Members: Toby Hyde (Con Edison), Julie Hawkins (National Grid), Jim MacMartin (National Grid), Nicole Williams (NYSEG, RG&E), Chris 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

- The intent of the Participating Contractor and Industry Partner (PC&IP) 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.

3/1 Program Manual Updates

The Joint Management Committee released an updated Program Manual on March 1, 2024. The following bullet points summarize those updates:

- The definition of a full load heating system has been updated to: “An installed system that satisfies at least 100% of total building heating load (BHL) at design conditions.” Prescriptive projects submitted after April 1, 2024 must use the new definition of full load at 100%.
- The Clean Heat program began offering incentives for air-to-water heat pumps for residential space heating on March 1, 2024. Incentive levels and other details are outlined in the Program Manual.
- National Grid discontinued partial load incentives (Category 1) and stopped accepting applications on January 31, 2024. As of that date, no utilities offer Category 1 incentives and they are completely phased out.
- Category 5, Category 7, and Category 8 have updated their names to provide more clarity. Please see the presentation slides and Program Manual for those updated names.
- Category 3 GSHP projects must be sized to meet at least 100% of the load of the project scope at design conditions and serve at least 80% of the building’s total square footage.
- Contractors must submit at least one application to the program every six months in order to maintain an “active” status. Previously, this threshold had been 24 months.
- Con Edison had previously announced a limited-time 2024 promotion that increased incentives for residential ASHP, residential GSHP, multifamily, and SMB – applications must be submitted by May 31, 2024 to be eligible for these limited-time promotions.
- Con Edison has also introduced non-residential GSHP incentives for thermal conductivity testing and has expanded offerings for multifamily projects. Please see the Con Edison Heat Pump Program Manual for additional details.
- Several new and updated tools and resources are now available on the Resources for Applications [webpage](#), including a Design Temperature Lookup tool, Guidance for Acceptable Load Calculations, the Statewide Custom Calculator v3.0 and accompanying User Manual, the Statewide HRC Calculator v1.1 and accompanying User Manual, and the Clean Heat Category 6 DHW Calculator v3.0. Brief descriptions and direct links to these resources are included in the presentation slides.
- The NYS Clean Heat website has recently undergone a reorganization and has a new layout. The primary website link remains <https://cleanheat.ny.gov/contractors>.
- In addition to the updated Program Manuals, the Clean Heat program has also recently filed an updated Implementation Plan on March 1 and a 2023 Annual Report initially filed on April 1.

TRC, a QA/QC service provider for the program, presented some case studies on common installation issues and best practices.

- Just a few vocal customers with bad experiences can change the public perspective on the effectiveness of heat pumps in upstate NY. That is why good installations are so important.

- Installation/design errors highlighted include oversizing, incorrect design temperature, incorrect pairing of spaces (leading to short-cycling), poor head placement, icing over of outdoor units, insufficient airflow for enclosed outdoor units, incorrect condensate line placement, incorrect ductwork, improper refrigerant charge, and non-UV-protected insulation.
 - More specifics on each of these case studies, including photos, are included in the presentation slides.
- Many resources are available on the Clean Heat Connect website: <https://cleanheatconnect.ny.gov/>.

There are also several upcoming training opportunities for contractors:

- AWHP training on Friday, April 26 at 9am
- Custom application and process webinar on Wednesday, May 15 at 9am
- School of Clean Heat Shorts on-demand video channel
- HVAC contractor survey conducted by PNNL
- All links are included in the presentation slides

Q&A

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

Question: What is the most current version of the calculator tool to use for ASHP projects?

Response: The current version of the statewide custom calculator tool is v3a, as available on the NYS Clean Heat website here:

<https://cleanheat.ny.gov/assets/other/Statewide%20CHP%20Custom%20Calculator%20v3a%20Mar-1-2024rev.xlsx>.

Question: A comment was offered regarding the relationship between Clean Heat and UTEN projects.

Response: Rules regarding UTEN projects are outlined in Case No. 22-M-0429. The Clean Heat program encourages interested stakeholders to participate in the formal Commission process.

Question: A comment was made appreciating the presentation on installation best practices and information regarding “mistakes” to avoid, as shared by TRC, as helpful information for contractors.

Response: The program appreciates the positive feedback and will continue to look to provide similar information in the future. Contractors should reach out to their account managers with any project-specific questions.

Question: Our understanding is that AHRI will start to list heat pumps with 410A refrigerant as “obsolete” starting January 1, 2025. Can the Program clarify that rebates will still be available for heat pumps that meet Energy Star criteria during the install sell-through windows, even if their AHRI certificates are shown as “obsolete” after January 1, 2025?

Response: Clean Heat rebates will be available for all NEEP-listed eligible heat pumps through authorized sell-through windows unless otherwise stated in future updates. EPA and DEC have both issued rules on transitioning to low Global Warming Potential refrigerants. Equipment will need to comply with all EPA and DEC regulations.

Question: Does the May 15th training cover all sectors of Clean Heat, or just residential?

Response: The event will cover both residential and commercial projects. It will not include the Con Edison custom process.

Question: What are the differences in process for Early Replacement projects and Special Circumstance projects as compared to a regular project?

Response: Specifications for Early Replacement and Special Circumstances projects are outlined in Sections 3.7 and 3.8 (Con Edison)/Sections 3.11 and 3.12 in the Program Manuals and describe baseline practices for custom projects.

Resources, Support, and Next Steps

- The next PC&IP meeting is scheduled for Thursday, June 13th (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.
- Links to additional program resources are included in the presentation slides.

The JMC thanks all attendees for their participation and engagement.