## **NYS Clean Heat Working Group Series**

for Participating Contractors & Industry Partners

## <u>Session #24</u> April 10, 2025 9:00 am–10:00 am

NYS Clean Heat Joint Management Committee



## **NYS Clean Heat**

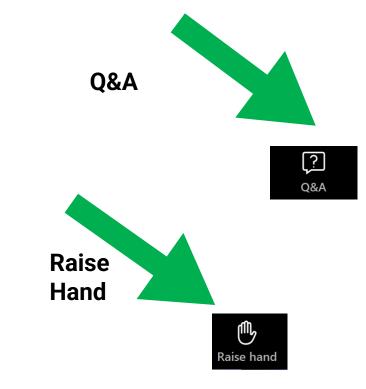
## Agenda

- > Meeting procedures (2m)
- > Welcome (2m)
- > Safety Message (2m)
- > JMC updates and discussion (45m)
  - Clean Heat Connect QA/QC Training
  - NYSERDA MREP Contractor Network
  - Program Filing Updates from April 1, 2025
  - Custom Calculator Tool Updates
  - Upcoming Training Opportunities
- > Stakeholder Presentation(s)
- > 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
    - > 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
  - > When using the Q&A function, please direct your question to "All Panelists," rather than one specific individual
    - > 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 <u>NYSCleanHeat@ceadvisors.com</u>



## Welcome

Joint Management Committee (JMC) Co-Chairs:

- > Ray Cotto, Central Hudson
- > Will Xia, NYSERDA
- > Karen Kao, NYSERDA
- > Tammy McKay, NYSERDA
- > <u>Other JMC Members</u>:
  - Toby Hyde: Con Edison
  - Pablo Colon: Con Edison
  - Sam Howe: National Grid
  - Sean Dooley: NYSEG, RG&E
  - Joshua Sentiff: NYSEG, RG&E
  - Chris Trenard: Orange & Rockland

- > <u>Our implementation team today:</u>
  - Kenn Latal: ICF
  - Tim Walsh: ICF
  - Matt Siano: ICF
- > Our Working Group support team:
  - Ben Davis: Concentric
  - Clara-Ann Joyce: Concentric
  - Will Roberts: 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

## Spring Safety Check

### > Check Smoke Detectors:

- Test alarms to ensure they are working
- Replace batteries if needed

### > Inspect Fire Extinguishers:

- Check pressure gauges
- Ensure they are easily accessible
- > General Safety Tips Onsite:
  - Review your emergency escape plan
  - Clear pathways and exits of any obstructions



# Clean Heat Connect QA/QC Course and Other Training Materials

NYS Clean Heat Quality Assurance Check - Online Training Course

**Short Videos Series - Heat Pump Installation Training** 

Video Tutorial: NEEP Heat Pump Sizing & Design Visualization Tool

**Cold-Climate Air Source Heat Pumps: Improving Installations by Weatherizing First** 

#### **Clean Heat Connect**

Heat pumps are the future of residential heating in New York. Don't be left behind. The Clean Heat Connect website has helped:

13,036 Total Visitors 34,188 Total Visits 42,254 Clicks on Resources & Trainings 929 NYS Clean Heat Participating Contractors

#### **Clean Heat Connect**

Clean Heat Connect is a network of distributors and manufacturers dedicated to expanding the adoption of heat pumps in homes across New York State. Find distributor and manufacturer hosted trainings, learn about sales and marketing strategies, and explore resources from NYSERDA, NEEP and trusted partners.

#### LEARN MORE



### NYS CLEAN HEAT QA CHECK ONLINE COURSE

Delivered through an online Learning Management System

Designed to provide information and resources on ASHPs

Mixed media and surveys to keep users engaged

Is not designed to be taken in one sitting

Users can jump around

Tracks the user's progress

#### VEWK NYSERDA Clean Heat Training



NYSERDA Clean Heat Connect is a network of contractors, distributors and manufacturers dedicated to expanding adoption of heat pumps in homes across New York state. Contractors can use Clean Heat Connect to find trainings hosted by product distributors and manufacturers, learn about sales and marketing strategies, and explore resources from NYSERDA, NEEP and others.

The goal of NYSERDA's Clean Heat Connect is to expand the knowledge and resource set of contractors to help them increase installation of cold climate heat pumps. Because heat pump manufacturers and product distributors have strong relationships with contractors, this platform highlights the distributors and manufacturers and their existing training materials.

### MODULES

- 12 Modules
- Multiple easy-to-use navigation tools
- Covers all 35 assessment points
- Formatted as videos to watch or as a course lecture to read
- Surveys to help users understand and retain knowledge



For C1, field agents confirm that the installed equipment make, model and quantities match what was proposed on the application.

The primary reason field agents check that what was installed matches the paperwork submitted is to ensure the system will operate as originally intended.

Even slight changes in equipment model types or indoor unit configurations can affect the system's capacity and efficiency.

If the installed system is sized improperly for the heating load, the system may not operate as designed, and the contractor will receive **calibacks from homeowners** with high bill and comfort complaints.

In extreme cases, the contractor may even face legal action by a homeowner.

If there will be changes to the installed equipment, the contractor is required to inform New York State Clean Heat and submit updated documentation.



### CONTRACTOR TRAINING – SHORT VIDEO SERIES

### **Cold-Climate Air Source Heat Pump –** Installation Refreshers Guide

This short video series demonstrates:

- Installation of a cold-climate air source heat pump (ccASHP)
- Quality installation that is critical for good performance and happy customers
- Short videos (2-5 minutes each) are easily watchable on phones, tablets, or laptops
- Each video is a concise refresher of a key step in ccASHP installation



#### VIDEO TUTORIAL: NEEP HEAT PUMP SIZING & DESIGN VISUALIZATION TOOL

an Heat Connect	RESOURCES	TRAININGS
Installation		
Learn the best installation techniques from professional heat pump	EXPLORE THIS SECTION	
installers.	Calendar	
Featured Videos:	Installation	
Installation Refreshers Guide NEEP Sizing Support Tools Tutorial Video	Sales	
Flare Fitting     Sizing, Design, and Product Selection		
Installation Challenges		
Installation Successes		

#### Installation Refreshers Guide

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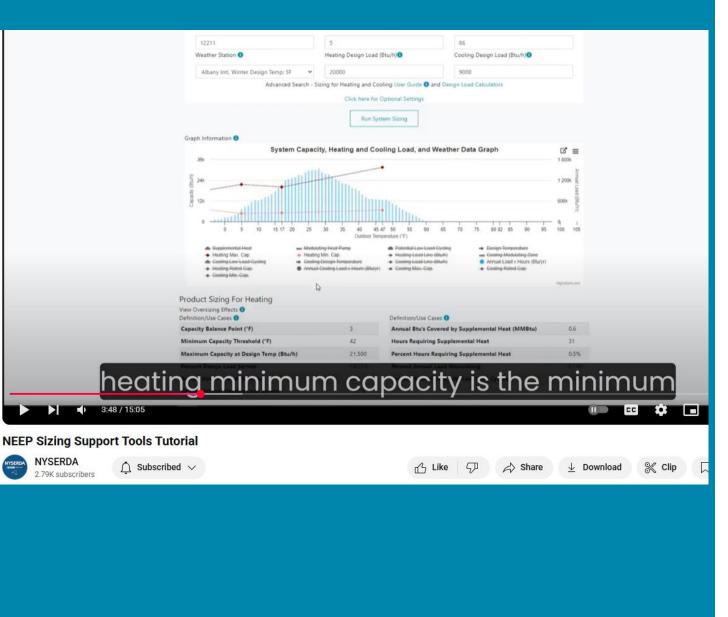
This short video series demonstrates the installation of a cold-climate air source heat pump. Quality installation is critical for good performance and happy customers. These short videos (2-5 minutes each) are easily watchable on phones, tablets, or laptops. Each video is a concise refresher of a key step in heat pump installation.

### On CleanHeatConnect.ny.gov

#### **Trainings Menu**

-Installation

-NEEP Sizing Support Tools Tutorial Video



### **PRIORITIZING EFFICIENCY**

Primarily designed for HVAC contractors

Discusses the benefits of incorporating envelope improvements into work scope **BEFORE** heat pump install

Encourages HVAC contractors taking on this high margin work themselves

Gives a real-life example of how envelope improvements drastically decrease the loads on a home

Cold-Climate Air Source Heat Pumps Improving Installations by Weatherizing First



#### Reducing Loads Leads to Improved Heat Pump Installations

Nine out of 10 homes in the U.S. are under-insulated. Air leakage can account for 25-40% of the energy used for heating and cooling in a typical home. Basic weatherization improvements can reduce the design loads of a New York State home significantly.

#### **HVAC Contractor Benefits**

Reduced design loads allow for a more compact system design, saving installation time and first-cost. Resulting in a more competitive bid and long-term bill savings.

Providing the homeowner with the best solution builds customer trust, even if it means delaying heat pump installation.

Upgrading the building envelope before the heat pump installation prevents an oversized, inefficient heat pump and ensures customer comfort while preventing callbacks.

Offering weatherization services improves your reputation with customers, increases revenue. and diversifies your business.

control and short cycling.

Reducing the heating load creates more balanced loads for homes in cold climat

Weatherization measures vary in impact and complexity. The table below ranks common measures by priority to the building. Measures with a (v) are easily done without much additional training. HVAC contractors can often offer measures with a (+) after some extra effort. Other measures are best done in collaboration with a home performance contracting partner. Build more trust with your customers and improve heat pump installations by upgrading the home's envelope first.

Priority	Weatherization Measures	Homeowner DIY	HVAC Contractor	Home Performance Partner
****	Air-seal attic and below-grade spaces'	4	1	4
****	Duct clean, seal, and insulate'		1	1
••••	Attic insulation and radiant barrier to Energy Code		+	×
****	Rim joist/below-grade insulation		+	1
•••	Continuous exterior insulation and windows upgrade			1
**	Air-seal any wall penetration	1	1	1
••	Weatherstrip windows & doors	1	+	1
•	Solar control window film	1	+	1
•	Electrical outlet gaskets	1	+	1
•	Exterior shading on exposed walls	1		1

Tightly sit-sealing a home requires addressing ventilation and indoor air quality. The HVAC contractor or home performance partner should also install kitchen and bathroom exhaust fans which vent to the exterior, and/or an Energy-Recovery Ventilation (ERV) or Heat-Recovery Ventilation (HRV) mechanical ventilation system

### FIRST STEPS INTO WEATHERIZATION

Business and workforce development tips and resources

Sales guidance for talking with customers

Clear talking points for sales

• Works great in tandem with homeowner resource:

Better Health, Better Comfort, Better Home

#### How to Add Weatherization to Your Business



Join or use resources from trade associations, such as the Building Performance Contractors Association (BPCA) of New York State, to learn more about the industry. You'll also expand your network to grow your business and workforce.



Partner with an established home performance contractor and work together to decarbonize more homes by weatherizing and electrifying heating and cooling.



Hire an experienced professional in the home performance market to help kick start your weatherization services. NYSERDA workforce development programs offer wage reimbursement that can support you financially.



Seek training support from a trade association, manufacturer or distributor of insulation and air sealing materials, or attending a sponsored conference or workshop. Take advantage of free training from the Department of Energy, WxTV, Building Performance Association, and National Grid's Project C.



Obtain certifications and credentials to become an installer in existing weatherization programs such as NYSERDA EmPower+, NYSERDA Comfort Home, PSEG Home Comfort, and more.

#### How to Sell Weatherization to the Customer

Help your customers understand the value of adding weatherization to your scope of work by making your services more relatable. Drawing a comparison for them - like how cell phones need updates to maintain their functionality, home HVAC systems and building envelopes need attention to ensure reliability, performance, comfort, and safety. Adding insulation and air sealing is the update your customers' homes need!



#### Additional Benefits to the Customer



Homeowners can purchase a smaller and higher quality HVAC system, while using less energy right away and potentially lowering their monthly bills.



Temperatures and humidity stay more consistent throughout the home. This leads to better year-round comfort.



Less polien, dust, and pests enter the home, improving the quality of living for those with allergies, asthma, and with other respiratory concerns.

Ar Roof snow melts more evenly reducing the chance of ice dams. The attic will stay drier, reducing the risk
 of building damage from moisture.

C-CON-envelopeing-coverant-b-Lvf 3/25



### EXAMPLE WEATHERIZATION DESIGN LOAD REDUCTION

Real life example of a 1950's single family home in Saratoga County. Uses same example house from <u>Reduce Over-Zoning</u> intervention

Shows load reductions if the HVAC installer weatherizes the home before installing the heat pump

Shows how total project cost varies with weatherization plus heat pump installation

Explains how the heat pump capacity required substantially reduces by implementing

Three weatherization package examples

#### Scenario

Homeowners of a 1950's single-family, two-story 1700 square foot Cape Cod style house in Saratoga County, NY are looking to get a full load cold-climate air source heat pump (ccASHP) system installed. The home's outdoor heating design temperature is 1° F. The building envelope is poorly insulated and leaky. The HVAC contractor runs an ACCA Manual J calculation based on following existing conditions and heating load:

#### Infiltration: 20,413 Btu/hour (30%) Semi-loose

#### Ceiling: 9,632 Btu/hour (14%)

- Vented attic
  R-7 cavity insulation
- Asphalt shingles
- No roof deck insulation

#### Ducts: 15,514 Btu/hour (33%)

 Unsealed and uninsulated
 Located in an enclosed crawlspace

- 2'x 4' wood stud framing
  R-13 cavity insulation
- · No exterior board insulation

Walls: 9,835 Btu/hour (15%)

Vinyl siding

Above grade

- Below grade
- Concrete masonry
- No insulation

#### Doors: 565 Btu/hour (1%) Metal with fiberglass core



#### Floors: 6,302 Btu/hour (9%)

Above grade

- Wood frame
- R-19 cavity insulation
- Vented/leaky crawlspace

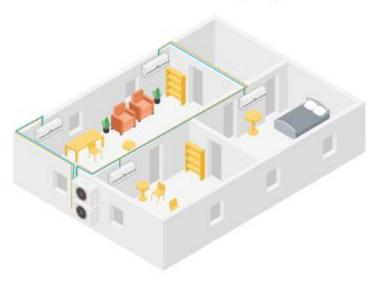
#### Below grade

- Concrete slab floor
- No insulation

#### Windows: 5,203 Btu/hour (8%)

Clear low-e double pane operable windows with clad wood framing

#### Initial Bid Four Multi-Zone Ductless Split Systems



#### EXAMPLE WEATHERIZATION DESIGN LOAD REDUCTION

	Upgrade Packages & Heat Pump Install	Package Total	Heating Load	Cooling Load	*Estimated Annual Energy Costs	**Lifetime Energy Cost
Initial Bid	Weatherization Upgrades: None Heat Pump System: Four multi-zonal ductless split 66 kBtu/hr heat pump systems throughout the home	\$29,000	67 kBtu/hr	25 kBtu/hr	\$4,102	\$61,530
Option 1	Weatherization Upgrades: Sealing all ductwork and insulating exposed ducts in unconditioned spaces to R-8 wrap Heat Pump System: One 42 kBtu/hr central packaged heat pump for the main floor of the home & two 6 kBtu/ hr mini-splits for the upstairs	\$27,750	55 kBtu/hr	21 kBtu/hr	\$3,371	\$50,565
	Percent or amount change compared to initial bid.	↓ \$2,250	↓19%	↓ 17%	↓ \$731/yr	↓ \$10,965
Option 2	Weatherization Upgrades: Includes Option 1 Package, plus air sealing and insulating the small attic spaces and kneewalls with foam board and cellulose insulation Heat Pump System: One 42 kBtu/hr central packaged heat pump for the entire home	\$25,800	42 kBtu/hr	17 kBtu/hr	\$2,591	\$38,865
	Percent or amount change compared to initial bid.	↓ \$4,200	↓ 38%	↓ 30%	↓ \$1,511/yr	↓ \$22,665
Option 3	Weatherization Upgrades: Includes Option 2 Package, plus installing R-19 below-grade interior wall and R-12 above-grade exterior foam board wall insulation and reusing sidingHeat Pump System: One 36 kBtu/hr central packaged heat pump for the entire home	\$34,400	37 kBtu/hr	15 kBtu/hr	\$2,268	\$34,020
	Percent or amount change compared to initial bid.	个 \$5,400	↓ 47%	↓ 39%	↓ \$1,834/yr	↓ \$27,510

### **DESIGN LOAD REDUCTION**

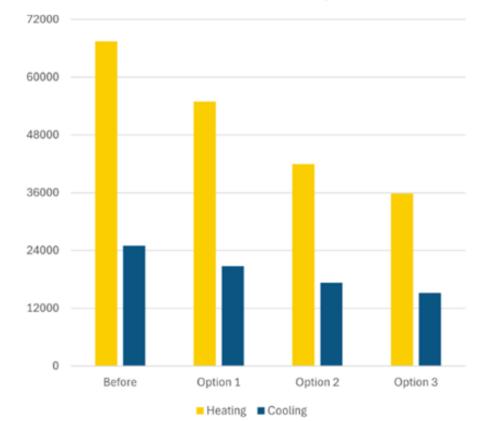
Weatherizing first leads to a lower capacity heat pump and...

- reduces install time for the heat pump
- lowers utility costs
- Increases comfort
- reduces cooling oversizing and over-zoning

Heating Load cut by 47%

Cooling Load cut by 39%

#### Heating and Cooling Load Reduction with Weatherization Upgrades



### **UPDATED COLLATERAL**

### **NYS Clean Heat Sell Sheets**

### **NYS Clean Heat Enrollment Poster**

### **Snow Deflector Products**

	grid company	k	KO NY	IN SEG	2	NYS Clean Heat	Partie	me a NYS Clear cipating Contrac /s to participate.	tor.	natior	nal <b>g</b>
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	s and rebates availabl	e:		es and rebates	availabl		3. Install qu	e approved equipment. A list of qualifi- alified equipment for a National Grid	electric customer. See the list o	of eligible equipment on the back	k; plus,
	Technology	Incentive			availabl		Heat Pro	eive a buying guide to help you expla gram website at nyscleanheatrebat	an equipment benefits to custo tes.com and get paid!	mers. See projects on the NYS	Clean
·	ccASHP: Full-Load Heating	\$/(0.000 Blu/h o capacity at 5%, at NEEP Product List	Category 2	Technology		S/10,000 Bu/h of maximum heating	2. Projects	om projects: require pre-approval. Reach out to yo	our program representative to g	get started. If you aren't sure, en	nai
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### CONTACT

### **Michael Courtney**

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(518) 862-1090 x3139



# **NYSERDA MREP Contractor Network**

## Multifamily Residential Energy Pathways (MREP) Participating Contractor Network RFQL 5906

An established network of highly qualified firms/contractors who work directly with developers, building owners, and their representatives to plan and implement energy efficiency and beneficial electrification projects for Multifamily programs.

- Robust network of contractors
- Simplified, centralized approach for customers
- Replaces Multifamily Building Solutions Network

Launched November 2024

## **Benefits of Being in Network**



NYSERDA Multifamily Residential Energy Pathways Participating Contractor

- > Access NYSERDA Incentives: Eligible to submit applications for multifamily programs
- > Build Skills & Network: Quarterly webinars with program updates and presentations on emerging technologies, market insights
- > Grow Customer Base: Inclusion on Find a Contractor page for visibility and to generate leads
- > Enhance Reach & Reputation: Access marketing collateral, case studies and web-based resources
- > Tap into Technical Assistance: Utilize Energy Use Snapshot, NYSERDA's baselining services, for eligible projects (detailed in program materials)
- > Offer Feedback on Program Design: Share feedback with NYSERDA program team to inform future program design

## **Service Categories**

Service Category	Service Sub-Category
Energy Assessor	Energy Assessor
	Air Source Heat Pump
	Ground Source Heat Pump
	Direct Exchange Ground Source Heat Pump
Installer	Electrician
Installer	Plumber
	General Contractor
	Insulator – Shell/Envelope
	Insulator – Window/Insulated Panel/Storm Window

## **Standard Application Requirements**

Εν	Evaluation Criteria		
Profile & Minimum Requirements	<ul> <li>Certifications, Accreditations &amp; Licenses</li> <li>Insurance</li> <li>W-9 Form</li> <li>Signed Participation Agreement</li> </ul>	0	
Case Studies	3 case study submissions	30	
Business Qualifications	<ul> <li>MWBE, SDVOB</li> <li>Work Experience</li> <li>Business Stability</li> <li>Geographic Coverage</li> <li>Staffing Plan</li> </ul>	23	
Customer References	3 separate relevant customer references	15	
Management Plan	<ul><li>Customer Service Plan</li><li>Quality Control Plan</li></ul>	12	
Category Specific Technical Documents	<ul> <li>Energy Assessor – Energy Audit</li> <li>Installers – Sample Bid Package</li> </ul>	30	
	110 Total Points		

## **Shortened Application**

**Shortened Application** – Does not require case studies, customer references, technical expertise documentation

**Eligibility** - Providers in good standing that joined one of the eligible networks in past **3 years** or had a project complete construction in **MPP**, **AMEEP**, **WAP** or **LCP** since then are eligible. Will be asked for documentation to confirm they meet this status.

### **Eligible networks**

- Multifamily Building Solutions Network
- Comfort Home Contractor
- EmPower+ Contractor
- FlexTech Consultant
- NYS Clean Heat Participating Contractor
- AMEEP Participating Contractor
- WAP Subgrantees
- HPD Pre-Qualified Vendor
- NYC Accelerator Service Provider
- NYCHA PACT Developers and General Contractors

## **Shortened Application Requirements**

	Evaluation Criteria	Available Points
Profile & Minimum Requirements	<ul> <li>Certifications, Accreditations &amp; Licenses</li> <li>Insurance</li> <li>W-9 Form</li> <li>Signed Participation Agreement</li> <li>Proof of Existing Network Membership or Completed Project</li> </ul>	0
Case Studies		
Business Qualifications	<ul> <li>MWBE, SDVOB</li> <li>Work Experience</li> <li>Business Stability</li> <li>Geographic Coverage</li> <li>Staffing Plan</li> </ul>	8
Customer References	<ul> <li><u>3 separate relevant customer references</u></li> </ul>	
Management Plan	<ul> <li>Customer Service Plan</li> <li>Quality Control Plan</li> </ul>	12
Category Specific Technical Documents	<ul> <li>Energy Assistance – Energy Audit</li> <li>Installers – Sample Bid Package</li> </ul>	
	20 Total Points	

## **Application Best Practices**

- > For completed project or active membership in partner networks, MUST submit proof of eligibility
  - > Can be email or letter of completed project in the last three years or membership to network in the last three years
- > Management Plan
  - > We have a template to assist in this development

### Multifamily Residential Energy Pathways Participating Contractor Network

Management Plan – Customer Service Plan

This document is intended to help firms develop their customer service plans. Applicants can use their responses to the prompt questions to develop the plans. The Customer Service Plan will be evaluated based on how well the applicant addressed the following items: 1) lead and referral handling, 2) feedback mechanisms, and 3) customer dispute resolution policy. These three items must be included in the customer service plan to receive full points. The length of the plans may vary. Please note that a complete Management Plan compliant with the requirements of RFQL 5906 must also include a Quality Control Plan in addition to the Customer Service Plan. Refer to RFQL 5906 for details on what is entailed in the Quality Control Plan.

#### Lead and Referral Handling

For this section, please address the following questions.

- Describe your proposed methodology in detail for receiving leads and referrals from NYSERDA. Please specify
  how you organize leads and customer acquisition (i.e., Excel Spreadsheet, CRM, other software).
- Describe your established policy to return calls or web inquiries from prospective customers including response time and method.

#### Sample Plan Responses

The company will have dedicated staff appointed to monitor incoming NYSERDA and prospective customer referral emails and calls daily and be required to respond to each lead within two business days. All referrals and leads will be saved and tracked in a database with the contact information of the prospective project, the date the lead or referral was received and responded to, and the source of the lead or referral [from a prospective customer, web search, NYSERDA, etc.].

If upon the company's response [email, phone, etc], there is no follow-up from the prospective customer after [two weeks], the company will make a follow-up attempt to the prospective customer. If after [one month], there is no response from the prospective customer, then the company will issue one final attempt to contact the prospective customer. All outreach attempts to the prospective customer will be tracked in the database.

#### Feedback Mechanisms

#### Prompt Questions:

- Describe how the organization will solicit feedback from customers. Please detail communication and organization methods for receiving that feedback.
- Indicate how this feedback is used to improve business operations and customer service.

#### Sample Plan Responses

During the initial call with each client the company makes it clear that feedback, both positive and negative, is encouraged throughout the lifecycle of the project. The company provides a dedicated system to handle all customer feedback and concerns. When a project comes to a close, the customer is again asked to provide any feedback as to what they thought was done well, as well as any pain points in the project, and any areas for improvement. Below are the specific question prompts sent to customers of all completed projects [list of question prompts provided]. That feedback is captured through [Survey instrument, customer interview with project manager, etc.]. Customer feedback is logged [saving the customer's email, logging notes from a call into a customer relationship management tool, etc.] to be reviewed and used for continuous improvement. Feedback is shared with the project management team to recognize what was done correctly and encourage it is continued for future projects and to brainstorm how to address and rectify any negative feedback in the future. Any notification of issues regarding a recently completed project will be addressed following our Customer Dispute Resolution Policy. The same parameters are used for each project review to establish a standard against which all projects are evaluated. This feedback is reviewed upon project completion and a

summary of the feedback is available for semi-annual review.



## Application Resources nyserda.ny.gov/multifamilycontractornetwork

#### Multifamily Residential Energy Pathways Participating Contractor Network

The Multifamily Residential Energy Pathways Participating Contractor Network (Contractor Network) is a roster of highly qualified firms and organizations who work directly with developers, building owners, and their representatives to plan and implement energy efficiency and carbon reduction projects in multifamily buildings. The Contractor Network replaces NYSERDA's Multifamily Building Solutions Network and includes expanded service categories (see below) to ensure the full scope of multifamily property needs are being addressed with any energy retrofit project.

Joining the Contractor Network offers contractors the opportunity to support NYSERDA's multifamily programs, including forthcoming Home Energy Rebate program funds through the Inflation Reduction Act (IRA).

Benefits of participating in the Contractor Network include:

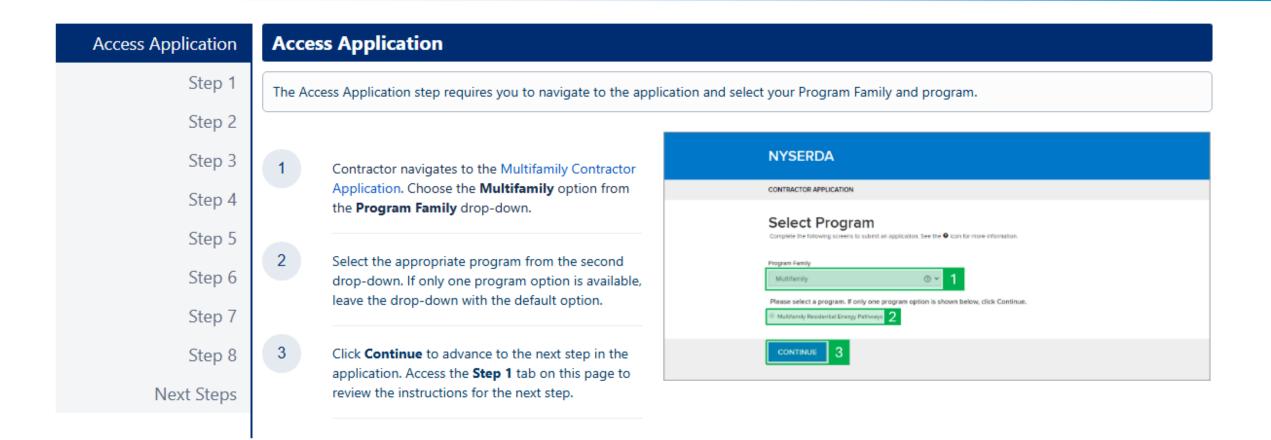
- Access NYSERDA and IRA incentives: Deliver incentives to eligible customers through the Low-Carbon Pathway Program and IRA Home Energy Rebate multifamily programs, helping close the deal on potential projects.
- Grow your customer base and generate leads: Get listed on NYSERDA's contractor page, where participating contractors will be highly visible to a steady stream of clients/projects and have the ability to capture leads through NYSERDA.
- Enhance your reach and reputation: Leverage marketing collateral, case studies, and web-based resources that demonstrate the benefits of working with NYSERDA's Contractor Network.
- Build your skills and network: Join Network Quarterly Webinars and any technical conferences, webinars or trainings regarding new technologies and methodologies in the field organized by the NYSERDA Multifamily team.
- Tap into technical assistance: Utilize the Energy Use Snapshot, NYSERDA's baselining services, for any eligible project.
- Service Categories and Minimum Requirements
- > IRA Home Energy Rebates Multifamily Program Overview
- Application Portal and Application Resources

- Application Portal and Application Resources
  - Participating Contractor Network Solicitation and Application (RFQL 5906)

Supporting application materials:

- Contractor Application Webinar Presentation (PDF)
- Participating Contractor Webinar October 28, 2024 12
- Participating Contractor User Guide
- Application Training Questions & Answers (PDF)
- Management Plan Customer Service Plan (PDF)

## **User Guide**



## **Questions?**

## Please email mrepnetwork@nyserda.ny.gov

## **Thank you!**

### Multifamily Contractor Network





# Program Filing Updates from April 1, 2025

## **Program Manual Changes**

- > Performance and eligibility criteria for commercial unitary systems/large commercial ASHPs has been updated
- > Projects in Category 4a Custom Heat Pump + Envelope are required to provide documentation showing that the proposed envelope meets code (envelope COMcheck or equivalent)
- > Eligibility for single-package vertical heat pumps (SPVHPs) has been made consistent throughout the Program Manual to follow criteria previously listed in Table 1
- > Language regarding coordination of NYSERDA and NYS Clean Heat incentives has been updated
- > Testing procedure for water-source VRF has been updated
- > National Grid and NYSEG have updated their incentive amounts (see later slides)

## **Program Manual Changes**

- > HP-DOAS eligibility has been updated
- > Documentation requirements for custom DHW applications have been updated
- A description of the contractor badging system for the non-Con Edison utilities has been added (see later slides)

### **Resources for Applications**

NYSERDA and the NYS Electric Utilities have compiled a wide variety of resources to assist the NYS Clean Heat Participating Contractor Network. The clean heating and cooling solutions offered through NYS Clean Heat will help residents, small businesses, and commercial and multifamily building owners reduce their energy usage and cost.

PROGRAM MANUAL: CHG&E, NGRID, NYSEG, O&R, AND RG&E (PDF)

PROGRAM MANUAL: CON EDISON (PDF)

## National Grid Incentive Updates

Category	Description	Incentive Structure	Previous Rate	New Rate
2	ccASHP: Full Load Heating		\$800	\$1,200
2a	ccASHP: Full Load Heating with integrated controls	\$/10,000 Btu/h of	\$1,000	\$1,400
2b	ccASHP: Full Load Heating with decommissioning	<ul> <li>maximum heating</li> <li>capacity at NEEP</li> <li>5 F</li> </ul>	\$1,200	\$1,600
2e	Air-to-Water Heat Pump, for space conditioning		\$800	\$1,600
3	GSHP: Full Load Heating	\$/10,000 Btu/h of full load heating capacity as certified by AHRI	\$1,500	\$2,500
5	Residential Rated HPWH	\$/Equipment unit	\$700	\$1,000

## National Grid Incentive Updates

Category	Key Eligibility Criteria	New Incentive Rate				
Custom Space Heating: Large air-to-air, air-to-water, and ground-source heat pumps; energy recovery systems; heat recovery chillers						
4: Full Load Space Heating	Eligible equipment meeting >100% of heating load at design	\$80 per MMBtu annual savings				
10: Partial Load Space Heating	<ul> <li>Eligible equipment serving &lt;100% of heating load</li> <li>Heat pump must be first-stage, primary heating system</li> <li>Must provide min 50% reduction in baseline heating energy use, or 4,000 MMBtu annual energy savings</li> </ul>	\$80 per MMBtu annual savings				
Space Heating with Envelope Improvement	ents					
4a: Heat Pump + Envelope	Envelope improvements must produce at least a 5% reduction in Building Heating Load Applicants must submit models for both baseline conditions and improved building	Tier 1: \$80 per MMBtu annual savings Tier 2: \$100 per MMBtu annual savings				
Water Heating						
5: Residential-rated heat pump water heaters	<ul> <li>Energy Star-qualified heat pump water heaters; instant retail discount or purchase from participating distributor</li> </ul>	\$1,000 per unit				
6: Custom Water Heating	Qualifying central heat pump systems used for domestic hot water	\$80 per MMBtu of annual energy savings				
Multifamily incentives						
4b: Multifamily Space Heating	Multifamily buildings with 5 to 100 dwelling units	\$2,000 per dwelling unit				
6a: Multifamily Water Heating	Category 4- or 6-eligible equipment	\$500 per dwelling unit				

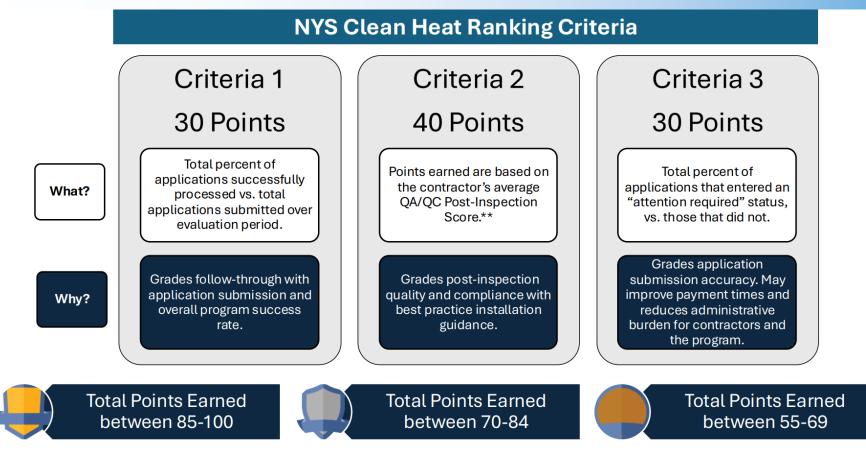
# **NYSEG Incentive Updates**

Category	Description	Incentive Structure	Previous Rate	New Rate
2	ccASHP: Full Load Heating	\$/10,000 Btu/h of maximum heating capacity at NEEP 5 F	\$800	\$1,000
2a	ccASHP: Full Load Heating with integrated controls		\$1,000	\$1,250
2b	ccASHP: Full Load Heating with decommissioning		\$1,200	\$1,500
2e	Air-to-Water Heat Pump, for space conditioning		\$800	\$1,000
3	GSHP: Full Load Heating	\$/10,000 Btu/h of full load heating capacity as certified by AHRI	\$1,500	\$2,000
5	Residential Rated HPWH	\$/Equipment unit	\$700	\$900
5 Midstream	Residential Rated HPWH	\$/Equipment unit	\$800	\$1,000

# **RG&E Incentive Updates**

Category	Description	Incentive Structure	Previous Rate	New Rate
5	Residential Rated HPWH	\$/Equipment unit	\$700	\$900
5 Midstream	Residential Rated HPWH	\$/Equipment unit	\$800	\$1,000

# **Contractor Badging System**



\*To be eligible for badging, Participating Contractors must submit at least three projects during the review period to the NYS Clean Heat Program.

\*\*Inspections scores are graded on a 1-5 scale. Corrective action made on post-inspection reports will earn back 50% of lost points.

\*\*\* Scores and criteria are based on program guidelines at the time of application submission.

#### nys-fac-badge-legend.pdf 38

# **Contractor Badging System**

#### Cadence and Updates:

- > Review periods will be for the past 6-months of application data moving forward. Criteria 2 will remain a cumulative average.
- > We plan to increase frequency of badge review and assignments to be responsive to recent efforts.
- > Entering a disciplinary status (Probation, Suspended, etc.) will remove you from badging consideration.

#### Scoring Clarifications and Tips:

- > Criteria 1: "Attention Required" and "Application Inactive" status applications count against this category. Resolve those to improve your score.
- > Criteria 2: Submitting corrections on Corrective Action Reports (CAR) will provide 50% of the lost score on that report.
  - > A CAR with a score of 2 out of 5, correcting those items will increase that score to 3.5
  - > Successfully contested CAR non-conformances will have the associated negative points removed from the report.
- > Criteria 3: If an application enters the "Attention Required" status at any time it counts against this category.
  - > To improve, dedicate time to training and accurate application submission.
  - > If no action is required from you to resolve the application, contact your account manager.

# **Con Edison Program Announcements**

- Eligibility for Con Edison's previously-announced 2025 Commercial Limited Time Offer ("2025 Commercial LTO") has been extended to applications received by May 31, 2025.
- > Per-apartment rates for residential GSHP projects
- > Service Adequacy requirement in non-residential sectors has been defined further.
- > A contractor disciplinary process for non-residential sectors has been added

#### **Resources for Applications**

NYSERDA and the NYS Electric Utilities have compiled a wide variety of resources to assist the NYS Clean Heat Participating Contractor Network. The clean heating and cooling solutions offered through NYS Clean Heat will help residents, small businesses, and commercial and multifamily building owners reduce their energy usage and cost.

PROGRAM MANUAL: CHG&E, NGRID, NYSEG, O&R, AND RG&E (PDF)

PROGRAM MANUAL: CON EDISON (PDF)

# **Additional Recent Filings**

- > A new Clean Heat Implementation Plan was filed in conjunction with the Program Manual on April 1, 2025
  - Budget & target tables updated for NYSEG/RG&E to reflect funding transfer and for O&R to reflect new Annual Expenditure and Achievement information
  - Market Development Plan Data updated
- > The Clean Heat Program's 2024 Annual Report was filed on April 1, 2025
- > Both can be found in the NYS DMM system in Case No. 18-M-0084 and on the NYS Clean Heat website

# **Custom Calculator Tool Updates**

# Custom Calculator Tool Updates: Category 4

Version 4, effective April 15, 2025

- > Major rework of Equipment Schedule tab
  - Now separate input "blocks" for five different types of heat pumps
    - ccASHP, ccPTHPs, Large heat pumps (VRF, RTUs), Small Commercial heat pumps, GSHPs
    - Improved/broader eligibility checking
  - Small Commercial heat pumps with SEER2 rating has been added
  - Inputs more tailored to each heat pump type, copying cells is easier, no extra inputs, etc.
  - Can now handle "HTG only" without cooling savings
  - DEMO mode works for all heat pump types

- > Other Improvements (Building Data, ERV)
  - Fixed cooling ratio (CR) calculations to match BCL/BHL rules in the Program Manual; improved interpretation of CR values
  - Allocation of loads across heat pump types improved (based on heating)
  - Part load threshold for Con Ed is now 1.0 (was 0.9)
  - ERV base case fan power increased from 0.25 to 0.35 W/cfm to match TRM
  - COP of WWHP is now derated (by 0.8) to reflect more reasonable hot water temperatures of 120F
- > Incentives
  - New incentives for non-Con Edison utilities (and NYSEG and RG&E are now separate)
  - Multifamily Category 4b incentives now spread across heat pump and ERV technologies (no change in total \$)
  - Fixed minor errors with Category 2 and 3 rates (calculations to limit incentive with oversizing)
  - Con Ed LTO rates now have expiration dates

# Custom Calculator Tool Updates: Category 6

Version 3.3, effective April 15, 2025

- > Added alternative method to calculate hot water use in Multifamily
  - Based on EIA data from HUD
- > Con Ed Incentive Changes
  - Expanded incentive rates to vary by program (Small/Medium Business, C&I, Multifamily)
  - LTO offer now has an expiration date

# **Clean Heat Training Opportunities**

# **Upcoming School of Clean Heat Trainings**

### **Clean Heat Program Overview (Avangrid/National Grid focused)**

- > ICF will host a free online training on Tuesday, April 22<sup>nd</sup> from 9-10:15 AM
  - Training will include: Calculating ASHP incentives & capacity at design temp; & Required documents.
- > You can register for the training at <a href="https://attendee.gotowebinar.com/rt/2041556043348155998">https://attendee.gotowebinar.com/rt/2041556043348155998</a>.

### Clean Heat Online Intake Tool Overview (Avangrid/National Grid focused)

- > ICF will host a free online training on **Thursday**, April 24<sup>th</sup> from 9-10 AM
  - Training will include: Submitting a rebate application and related submission details.
- > You can register for the training at <a href="https://attendee.gotowebinar.com/rt/5571086225044005209">https://attendee.gotowebinar.com/rt/5571086225044005209</a>.

#### NYS Clean Heat QA/QC Field Assessments Best Practices - Upstate Territory

- > ICF will host a free online training on Thursday, May 8<sup>th</sup> from 9-10:15 AM
  - Training will include: Common inspection failures and how to avoid them.
- > You can register for the training at <a href="https://attendee.gotowebinar.com/register/8166586777920162140">https://attendee.gotowebinar.com/register/8166586777920162140</a>.

# **Upcoming School of Clean Heat Trainings**

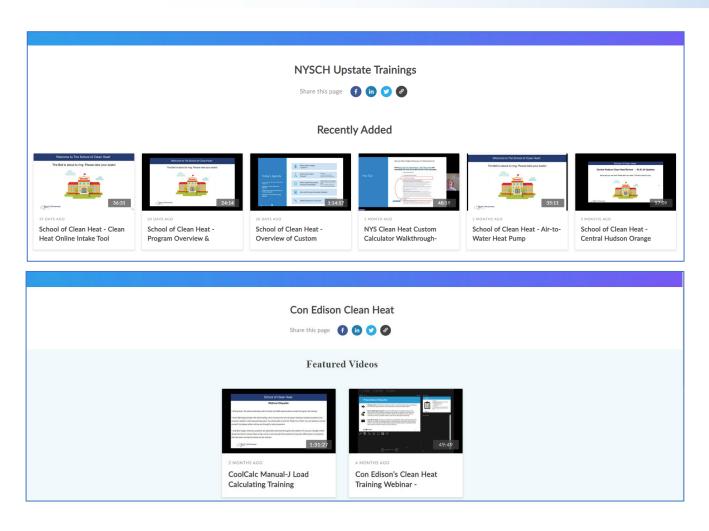
#### **Con Edison Clean Heat Program - April 2025 Webinar**

- > ICF and Con Edison will host a free online training on **Tuesday, April 15<sup>th</sup> from 9-10:30 AM** 
  - The agenda will include general program updates, program achievement & budget, and program manual changes.
- > You can register for the training at <u>https://attendee.gotowebinar.com/register/4420155934628502365</u>.

#### Con Edison Clean Heat Program - Residential Safety Compliance Training Webinar

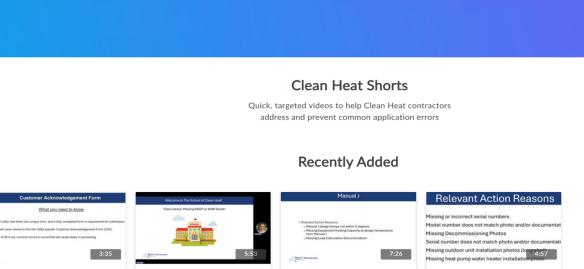
- > ICF will host a free online training on **Tuesday**, April 29<sup>th</sup> from 9-10:00 AM
  - This webinar will focus on addressing common safety failures in the decommissioning process, which impact inspection outcomes due to safety violations.
- > You can register for the training at <u>https://attendee.gotowebinar.com/register/3867466626389831253</u>.

# School of Clean Heat Webinar Recordings



- School of Clean Heat Upstate <u>Recordings</u>
- > School of Clean Heat Con Edison <u>Recordings</u>
- > Access at any time to fit your busy schedule!

## School of Clean Heat Shorts Channel



Forms

#### 6 DAYS AGO 11 DAYS AGO Missing AHRI/NEEP Manual J: Design Temps Not Customer Acknowledgment Photo Errors: Certificates within 5 Degrees, Missing Missing/Incorrect Serial or

- > Learn how to correct common application errors in minutes
- Cover only the specific training topics you need >
- > Access at any time to fit your busy schedule
- > Additional Clean Heat Shorts coming soon!

Visit School of Clean Heat Shorts

# **Stakeholder Updates**

> Topics encouraged to be coordinated via JMC through <u>nyscleanheat@ceadvisors.com</u>.

# **Reminder: Meeting Cadence**

- > The JMC has PC&IP meetings scheduled in early <u>June</u>, <u>September</u>, <u>December</u>, and <u>March/April</u>.
  - Aligns with future program announcements and updates moving forward
  - Continuous feedback is still encouraged through program representatives and NYS Clean Heat email inboxes
- > Utilities will continue engagement and outreach with individuals and small groups to align on potential program adjustments and get additional feedback from the industry

# Resources, Support, and Next Steps

- > Next PC&IP meeting on June 12<sup>th</sup>, 2025 (9:00 AM-10 AM)
  - Please submit potential topics for the next Working Group by June 5<sup>th</sup> via email to <u>NYSCleanHeat@ceadvisors.com</u> or directly to your utility partner.
- > Email blasts twice per quarter
  - 1. Early week following webinar: next steps, including slides and meeting summary report
  - 2. Week prior to meeting: Program changes and last call for potential topics
- > <u>NYSCleanHeat@ceadvisors.com</u> for <u>program</u>-related inquiries
- > <u>NYSCleanHeat@icf.com</u> and (844) 212-7823 for *project*-related inquiries
- > NYS Clean Heat Website (<u>https://cleanheat.ny.gov/contractor-resources/</u>)

# 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 <u>NYSCleanHeat@icf.com</u> 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 Edison: Toby Hyde, Section Manager, Phone: (917) 565-6911, Email: <u>hydet@coned.com</u>; Pablo Colon, Manager, Strategic Engagement
   Clean Heat, Phone: (646) 689-7224, Email: <u>colonp@coned.com</u>
- > National Grid:
  - George Angevine, Program Manager (Residential), Phone: (845) 490-7140 Email: George.Angevine@nationalgrid.com
  - Julie Hawkins, Program Manager (Custom), Phone (315)776-1006, Email: Julie.Hawkins@nationalgrid.com
- > NYSEG/RG&E: Sean Dooley, Program Manager, Conservation and Load Management Phone: (585) 629-8656, Email: <u>Sean\_Dooley@rge.com</u>
- > Orange & Rockland: Chris Trenard, Program Administrator, Phone: (845) 577-2317, Email: trenardc@oru.com

# **Additional Resources**

- > Co-chair contacts
  - Ray Cotto, Central Hudson: Phone: (845) 486-5750, Email: RCotto@cenhud.com
  - Will Xia, NYSERDA: <u>william.xia@nyserda.ny.gov</u>
- > All program documents are located on the NYS Clean Heat Resources page (<u>https://cleanheat.ny.gov/resources-for-applications/</u>)
- > All regulatory proceeding documents are located on the NYS DMM (<u>http://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=18-M-0084</u>)
- > Additional program resources are available on the Clean Heat Connect website (<u>https://cleanheatconnect.ny.gov/</u>)

# Thank you!





