

Working Group Series for Participating Contractors and Industry Partners

Session #26 | September 11, 2025, 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 11th and posted to the Resources for Applications webpage.*

Agenda

- Meeting procedures
- Welcome
- Safety Message
- Joint Management Committee (JMC) updates and discussion
 - NYS Clean Heat 2026-2030 Implementation Plan
 - Field Assessment and Decommissioning Checklist Changes
 - Upcoming Training Opportunities
- Stakeholder Presentation(s)
 - No submissions provided this quarter
- Clean Heat Resources and Next Steps

Program Representatives

- JMC Co-Chairs: Toby Hyde (Con Edison), Caroline Hazard (NYSERDA)
- JMC Members: Ray Cotto (Central Hudson), Pablo Colon (Con Ed), Ryan Bauer (National Grid), Joshua Sentiff (NYSEG/RG&E), Sean Dooley (NYSEG/RG&E), Chris Trenard (Orange & Rockland)
- Implementation Team (ICF): Kenn Latal, Tim Walsh, Matt Siano
- Working Group Support Team (Concentric Energy Advisors): Ben Davis, Clara-Ann Joyce, Aanchal Saini

Introduction

- 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.
 - The emphasis here is on open communication within the industry. The JMC wants 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.

- **NYS Clean Heat 2026-2030 Implementation Plan**
 - On May 15, the NYS Public Service Commission (PSC) issued orders authorizing \$5.36 billion statewide for the utility Energy Efficiency and Building Electrification (EE/BE) program for 2026-2030
 - The EE/BE Orders secure building electrification funding through 2030 and change the branding of building electrification:
 - “Clean Heat” will refer only to the residential (1-4 family homes) BE program
 - Building Electrification incentives for multifamily and commercial segments will flow through Program Administrator programs for those segments
 - The EE/BE Orders have defined program administration roles for the 2026-2030 period, the details of which can be found in the presentation slides
 - The presentation slides contain a timeline of 2025 EE/BE filings. For a complete list of dates and additional materials from technical conferences and other engagements that have already passed, please see Cases 25-M-0248 and 25-M-0249 in NYS DPS’s DMM filing system
 - On September 2, 2025 the Program Administrators filed a NYS Clean Heat Implementation Plan for 2026-2030
 - This can be found on the NYS DPS DMM website:
<https://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?MatterSeq=85962>
 - A separate Program Manual, which will include more detailed information such as incentive amounts and eligible equipment, is scheduled to be released on December 12, 2025
 - Incentive Structure:
 - In 2026, the Upstate Utilities will be moving to a flat-rate incentive structure, similar to what Con Edison has been using since 2023
 - Specific incentive levels will be included in the Program Manual and will generally be aligned with levels in the current program
 - Higher incentives will be available for homes that meet a Weatherized Tier
 - Most communities will have enhanced incentives if located in a Disadvantaged Community (DAC) designated area, as determined by the map available here:
<https://www.nyserda.ny.gov/ny/Disadvantaged-Communities>
 - Project Eligibility:
 - Projects must be sized to meet the full water or space heating load of the project scope for residential projects
 - This new phase of NYS Clean Heat will focus on existing homes and buildings, with some exceptions for new construction
 - 2025 incentives (including new construction air-source) will be honored for applications received by December 31, 2025

- More details on project eligibility for the end of 2025 and into 2026-2030 are available in the presentation slides
 - Weatherized Tier:
 - The EE/BE Orders require NYS Clean Heat to include a Weatherized Tier. Since this will be a new addition to the Clean Heat program, it is expected that it will evolve in the future. Industry feedback is welcome during this process.
 - Eligibility criteria for the new Weatherized Tier are outlined in the presentation slides
 - Homes that have participated in a utility or NYSERDA weatherization program, such as EmPower+, Comfort Home, etc., or that have participated in a government-sponsored program will be eligible
 - NYSERDA is piloting a Virtual Energy Assessment (VEA) tool in fall 2025, with a statewide availability planned for 2026. The Program Administrators plan that when the VEA tool is available to the market and assigns a building a designation of “Heat Pump Ready”, that building will qualify for the Weatherized Tier.
 - Additional details on criteria for the Weatherized Tier are included in the presentation slides
- **Field Assessment and Decommissioning Checklist Changes**
 - There are four changes to the field assessment process and decommissioning checklist that are now effective:
 - The defrost and condensate field assessment item has been split into Major and Minor versions
 - The pass/fail criteria for the outdoor unit level field assessment item have been refined
 - The program will be actively confirming the use of ACCA-approved software tools for Manual J calculations
 - A revised and simplified Category 2b Decommissioning Checklist is now available
 - More details on the specifics of these items, including photos and links to reference materials, are available in the presentation slides
- **Clean Heat Training Opportunities**
 - There are several upcoming School of Clean Heat Trainings in September and October. Please see the presentation slides for dates and registration links.
 - School of Clean Heat Webinar recordings and Shorts are accessible anytime at the links provided in the presentation slides.

Q&A

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

Question: As the program transitions to its new form in 2026-2030, will incentive applications still be processed through the existing OIT portal?

Response: Yes, applications will still continue to be reviewed and approved through the OIT portal.

Question: In the 2026 program phase, how would an existing home that gets remodeled or puts in an addition qualify for ASHP rebates? Would this fall under new construction?

Response: In general, remodels and extensions are considered part of existing buildings. Future details regarding new construction exemptions will be outlined in the Program Manual being released in December 2025.

Question: Do projects need to meet the new weatherization criteria to receive incentives?

Response: Projects that qualify for the Clean Heat Weatherized Tier will be eligible to receive an enhanced incentive until 2028. From 2028 onwards, weatherization will be a prerequisite to be eligible for Clean Heat incentives.

Question: Will the Clean Heat program work with other programs to help increase eligibility of insulation incentives?

Response: The Clean Heat program is primarily a program that offers incentives for heat pump products. The utilities envision close coordination with other weatherization programs run by utilities, NYSERDA, and other entities.

Question: Will there be additional certification requirements for the new weatherization options through Clean Heat? With the new weatherization requirement, will projects be required to go through EmPower+? Or can they go through utility-specific programs, such as Con Edison's Weather Ready program?

Response: Projects can choose to fulfill the criteria of the Weatherized Tier by participating in a utility or NYSERDA weatherization program with a package of contractor-installed measures, or an equivalent government-sponsored program. For example, in Con Edison's service territory, a home can use either EmPower+, if income qualified, or the Weather Ready program.

Question: Are there any considerations for offering partial load incentives for ASHP in residential homes?

Response: No. The Non-LMI EE/BE Order dictates that electrification incentives are only to be provided for full-load heating projects in 1-4 family homes.

Question: For projects that have gone through the NYSERDA program for insulation and air sealing upgrades, does this mean that the house will meet the guidelines for a Clean Heat Weatherization Tier enhanced incentive?

Response: Yes, beginning March 1, 2026, projects can choose to fulfill the Clean Heat Weatherized Tier by participating in a New York utility weatherization program or NYSERDA weatherization program (e.g.,

Comfort Home or EmPower +) with a package of contractor-installed measures, or an equivalent government-sponsored program.

Question: Several participants asked questions regarding participation in the EmPower+ program.

Response: As was noted during the webinar, stakeholders can email info.residential@nyscrda.ny.gov for more information pertaining to EmPower+. NYSCRDA has followed up with the interested participants from the webinar.

Resources and Next Steps

- The next PC&IP meeting is scheduled for Thursday, December 18th (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
- Links to additional program resources are included in the presentation slides

The JMC thanks all attendees for their participation and engagement.