

NYS Clean Heat Working Group Series

for Participating Contractors & Industry Partners

Session #26

September 11, 2025 9:00 am–10:00 am

NYS Clean Heat
Joint Management Committee



NYS Clean Heat

Agenda

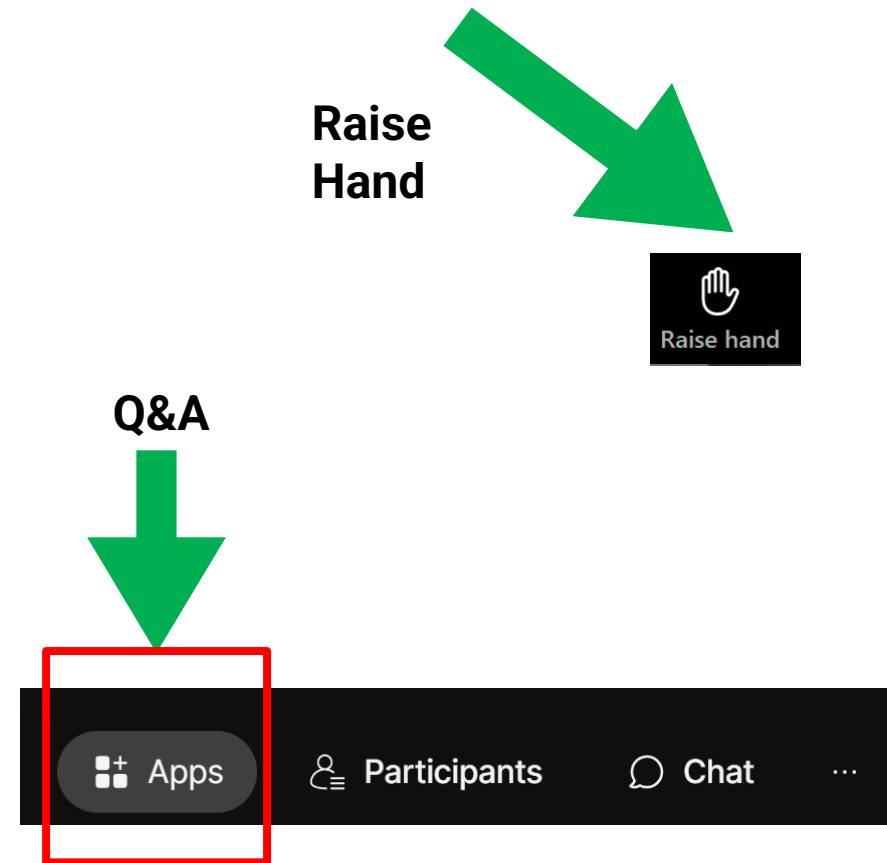
- > **Meeting Procedures**
- > **Welcome**
- > **Safety Message**
- > **JMC Updates and Discussion**
 - NYS Clean Heat 2026-2030 Implementation Plan
 - Field Assessment and Decommissioning Checklist Changes
 - Upcoming Training Opportunities
- > **Stakeholder Presentation(s)**
- > **Clean Heat Resources and Next Steps**



Meeting Procedures

Before beginning, a few reminders:

- > **All attendees will be muted**
 - > For questions or comments throughout, please use either the Raise Hand or Slido Q&A functions
 - > Select the Raise Hand icon in the bottom toolbar
 - > The meeting moderator will call on that attendee and unmute individually
 - > When you have finished asking your question, select the Raise Hand icon again to lower your hand
 - > To use the Slido Q&A function, please click on the “Apps” button in the bottom toolbar to launch the Q&A screen via Slido.
- > If technical issues arise, please contact NYSCleanHeat@ceadvisors.com



Welcome

Joint Management Committee (JMC) Co-Chairs:

- > **Toby Hyde**, Con Edison
- > **Caroline Hazard**, NYSERDA

> Other JMC Members:

- **Ray Cotto**: Central Hudson
- **Pablo Colon**: Con Edison
- **Ryan Bauer**: National Grid
- **Sean Dooley**: NYSEG, RG&E
- **Joshua Sentiff**: NYSEG, RG&E
- **Chris Trenard**: Orange & Rockland

> Our implementation team today:

- **Kenn Latal**: ICF
- **Tim Walsh**: ICF
- **Matt Siano**: ICF

> Our Working Group support team:

- **Ben Davis**: Concentric
- **Clara-Ann Joyce**: Concentric
- **Aanchal Saini**: 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

Safety Message: Drowsy Driving

- > You are three times more likely to be in a car crash if you are fatigued
- > Losing even two hours of sleep is similar to the effect of having three beers

Avoiding Drowsy Driving

- > Getting adequate sleep on a daily basis is the only true way to protect yourself against the risks of driving when you're drowsy.
- > Experts urge consumers to make it a priority to get seven to eight hours of sleep per night.
- > Create a sleeping environment that helps you sleep well: a dark, quiet, cool room with no electronics.



NYS Clean Heat 2026-2030 Implementation Plan

EE/BE Order Summary

- > On May 15, NYS Public Service Commission (PSC) issued orders ([Non-LMI](#) and [LMI](#)) authorizing \$5.36B statewide for the state's Energy Efficiency and Building Electrification (EE/BE) programs from 2026-2030.
- > The EE/BE Orders:
 - Secure building electrification funding through 2030
 - Change the branding of building electrification programs
 - “Clean Heat” will refer only to the residential (1-4 family) BE Program
 - Building Electrification incentives for multifamily and commercial segments will flow through Program Administrator programs for those segments
 - Define project eligibility
 - Set Program Administrator roles

Program Administration Roles

Utility roles

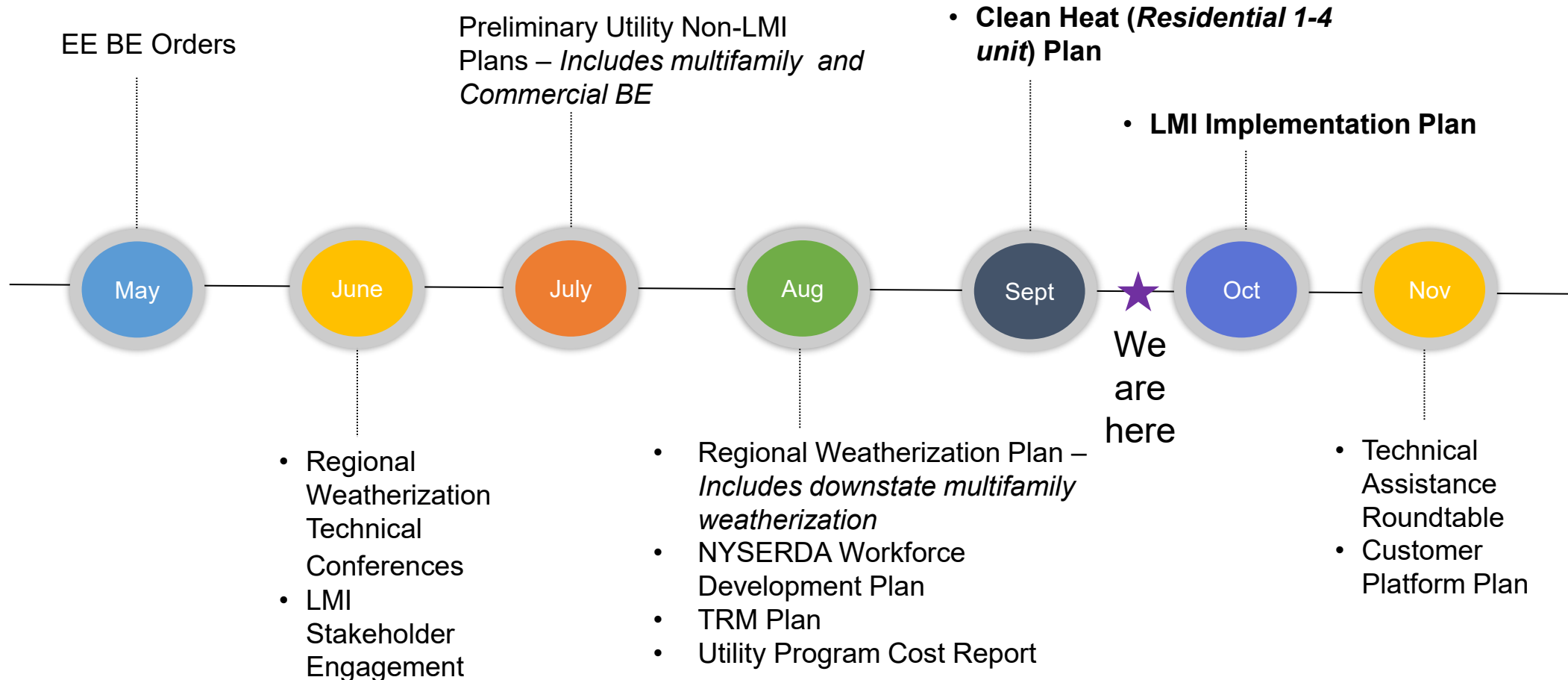
- Primary Program Administrators for market-rate programs
- LMI
 - Joint administration with NYSERDA for downstate LMI multifamily programs

NYSERDA roles

- Workforce Development
- General Awareness and Education
- Codes and Standards
- Technical Services
- Purposeful Demonstrations
- LMI
 - 1-4 programming statewide
 - Multifamily upstate
 - Joint administration with utilities for downstate multifamily

EE/BE 2025 Filing Timeline*

*For a complete list of dates, see
Cases 25-M-0248 and 25-M-0249



2026-2030 Clean Heat Implementation Plan

- > 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>
- > The main changes are:
 - A focus on customers in residential one- to four-family homes
 - Note: Non-residential and multi-family incentives will still run under different programs run by individual utilities
 - Incentive structure format
 - Inclusion of weatherization tiers
 - Updates to project eligibility
- > The Program Administrators plan to release a Clean Heat Program Manual on December 12, 2025, effective January 1st, 2026
 - Will include incentive amounts, eligible equipment, etc.

2026-2030 Clean Heat Project Eligibility

- > NYS Clean Heat will require projects to be sized for the full water or space heating load of the project scope (apartment or building) for residential projects
 - Multifamily and Commercial projects may employ a “Phased” Approach
- > Projects must deploy eligible equipment as defined in the Program Manual. Historically, NYS Clean Heat has used the following eligibility standards:
 - ASHP – NEEP cold climate ASHP List
 - GSHP – Energy Star
 - HPWH – Energy Star
 - AWH – NYS Clean Heat custom listing
- > NYS Clean Heat will focus on existing homes and buildings
 - Existing homes and buildings will be eligible for incentives for all technology types
 - New construction will be eligible for incentives for GSHP and HPWH where not otherwise mandated by law

Incentive Structure

- > In 2026, the Upstate Utilities (Central Hudson, National Grid, NYSEG, Orange & Rockland and RG&E) are moving to a flat rate incentive structure similar to the one Con Edison has used since 2023
- > Final structure is still under development with separate rates for full load ASHP projects, ASHP projects with decommissioning, and GSHP
- > Weatherized Tier – Additional fixed incentive amount per project
- > DAC Incentives – Tailored based on Utility service territory characteristics
- > Incentive levels to be announced in Fall 2025

Project Eligibility – 2025 Transition

Residential

- > Application deadline of 12/31/2025 for residential 1-4 family applications for ASHP, AWHP, and HPWH in **new construction** (*including prescriptive small business*)
 - *This application type will not be accepted starting 01/01/2026*
- > Application deadline of 12/31/2025 for all prescriptive rebate applications using a 2025 incentive rate/structure (*including prescriptive small business*)
- > Flat rate incentives for 2026 will take effect for applications submitted on or after 01/01/2026

Multifamily and Commercial

- > Served by utility programs, not Clean Heat, after 2025
- > Reach out to your respective utility representative for program information
- > In general, in-flight projects that have received preliminary incentive offer letters (“PIOL”) should be completed by October 2026

Weatherized Tier

- > The EE/BE Orders required NYS Clean Heat to adopt a Weatherized Tier with higher incentives
- > Program Administrators expect eligibility for the Weatherized Tier will evolve over time
- > As of January 1, 2026, buildings will be eligible for the Weatherized Tier if they meet any one of the four criteria on the following slide

Weatherized Tier Criteria

- > Built after 2010
- > Participated in a utility or NYSERDA weatherization program with a package of contractor installed measures
 - Or equivalent government-sponsored programs (WAP or county-run)
- > Receives a designation of “Heat Pump Ready Envelope” from NYSERDA’s forthcoming Virtual Energy Assessment (“VEA”) tool
- > Home energy assessment that certifies that a home has:
 - Air sealing
 - Attic insulation of R-38 or maximum in other cases
 - And meets the air changes per hour (ACH50) standard

ACH50 criteria for Weatherized Tier Eligibility

Building Vintage	<1,000 sf	1,000- 1,999 sf	2,000- 2,999 sf	3,000- 3,999 sf	4,000+ sf
Pre-1979	18	14	11	9	8
1979-2006	16	12	9	9	7
2007 or later	12	7	5	5	4

Field Assessment and Decommissioning Checklist Changes

Field Assessment and Decommissioning Checklist Changes

- > **Condensate/defrost management – splitting into two distinct Major and Minor versions (from all aspects being considered Major)**
 - > Revisited and reissued all reports since January 1, 2024 that would have been impacted
- > **Outdoor unit level – refined pass/fail criteria from bubble level basis to a measured >5° tilt**
 - > Revisited and reissued all reports since January 1, 2024 that would have been impacted
- > **Manual J matches the building – actively confirming the use of an ACCA approved software tool for the load calculation**
- > **Incentive level 2B Decommissioning Checklist – revised and simplified checklist use process. Fewer versions, better coverage of the potential scenarios.**
- > <https://cleanheat.ny.gov/standards-field-assessments/>

Revised Checklist Items to Evaluate Condensate and Defrost Drainage Issues

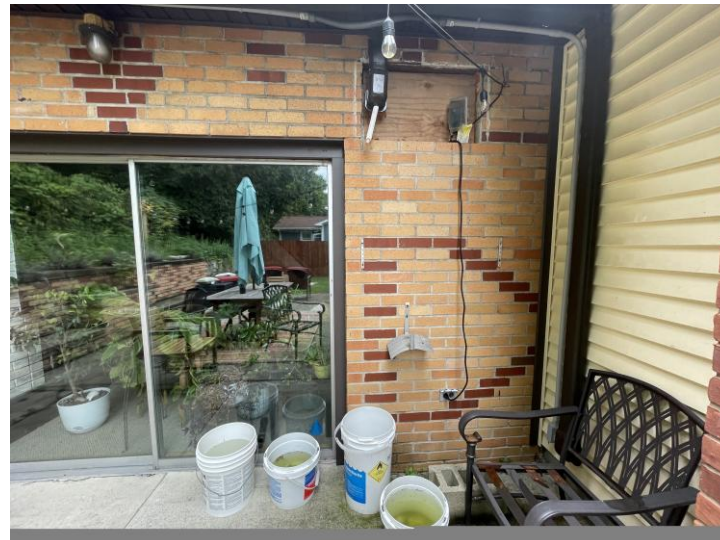
- > **Poor condensate and defrost management can result in:**
 - > Safety – slips and falls on re-frozen defrost or wet surfaces
 - > Building damage – cooling condensate must get out of the building, and be able to evaporate away once outside
 - > System function – extreme cases; defrost refreeze still in the drain pan can clog coils and damage components

Major – failure conditions	Minor – failure conditions
Condensate/defrost does not terminate outdoors or into a domestic drain	Condensate/defrost terminates where it is likely to lead to wood-rot on walls or structural components
Defrost drips onto another heat pump	Condensate is plumbed into DWV lines
Defrost drips where it can refreeze on walkways	Condensate terminates onto flat roofs/ patios/ ledges where it will pool.
Defrost/condensate drips onto a stairway	Condensate terminates within the line-hide
Signs of leakage along the condensate line	Other locations likely to lead to slip-risk or property damage
Condensate does not freely flow	

Defrost and Condensate Management



Major – condensate pump is not plugged in. Condensate drain line does not terminate outside



Minor – Condensate drain line terminates on flat patio where it can pool

Major Defrost and Condensate Management Examples

Major – defrost pools where it can refreeze on a walking surface



Revised Checklist Items for Condensate and Defrost Drainage

Checklist	Past Checklist Item (Defect Category)	Present Checklist Items (Defect Category)
ASHP	C3 (Major)	C3 (Major), C3B (Minor)
GSHP	C5 (Major)	C5 (Major), C5B (Minor)
AWHP	None	C14 (Major), C14B (Minor)
HPWH	C2 (Major)	C2 (Major), S9 (Major)

Outdoor Unit Level

- > **Non-level units can result in:**
 - > Oil pooling outside of the compressor resulting in accelerated wear
 - > Poor drainage out of the drain pan – leading to refreeze on internal components or rust/mold in the unit
 - > Excessive vibration resulting in excess noise and accelerated wear
- > **Previous enforcement – bubble level was entirely out of center**



- > **New enforcement – graduate level shows $>5^\circ$ tilt**



Manual J Matches the Building

- > https://www.acca.org/standards/approved-software?_ga=2.71077334.712733088.1757422885-279034825.1754663351
- > "If software is not listed on this page, then it is not ACCA-approved, and it does not produce results in compliance with our rigorous standards"

There are many load calculation platforms in the marketplace that do not use ACCA based calculations. Consistency across the NYS Clean Heat program is key to reliable repeatable outcomes.

- > **ACCA approved Manual J software or “approved exceptions” only**
 - > You must show that your building department actively accepted the alternative product for permitting purposes if not ACCA approved
 - > Must be pre-approved by the program before project submission



Manual J Matches the Building

MiTek[®]
WRIGHTSOFT[®]



Elite Software



Incentive Level 2B Decommissioning Checklist

- > Redesigned for ease of use as well as reflecting decommissioning scenarios that didn't fit the prior checklists

Follow these steps to find the appropriate checklists to use

Space Heating – Single Family Home or Multi-Family 2-4 Dwellings with <i>all</i> Units Treated		
Is the heating appliance being completely removed?	Is the heating appliance staying to serve DHW?	Fill out the following Decommissioning Checklist sub-section:
YES	N/A	1
NO	YES	2
NO	NO	3 and the Attestation
Space Heating – Multi-Family 2-4 Dwellings with <i>some</i> Units Still Serviced **		
NO	N/A	4

Incentive Level 2B Decommissioning Checklist

#1 – **Full removal** of the heating appliance

- Decommissioning of the heating distribution, fuel delivery/storage, and exhaust venting*

#2 – Decommissioning of a boiler appliance but **kept in place for DHW** production via an indirect tank

- Decommissioning of the heating distribution

#3 – Decommissioning of the heating appliance, but appliance is **not removed due to a pre-approved exception**

- Program pre-approval needed before project submission
 - Asbestos
 - Mold
 - Physical access
 - Customer keeping for different application
- Decommissioning of the heating distribution, fuel delivery, and exhaust venting*

#4 - Decommissioning of heating appliance in **select apartments 2-4 family**

- Decommissioning of the heating distribution and controls

*If the exhaust flue is shared with a fuel-fired water heater that will remain in use, exhaust venting is to be tested and possibly resized to remove back-drafting potential

Questions?



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503-773-9031
585-545-0527

Clean Heat Training Opportunities

Upcoming Clean Heat Trainings

Clean Heat Program Overview (Avangrid/National Grid focused)

- > ICF will host a free online training on **Wednesday, September 24th from 9-10:15 AM**
- Training will include: Calculating ASHP incentives & capacity at design temp; & Required documents
- > You can register for the training at <https://attendee.gotowebinar.com/rt/2041556043348155998>.

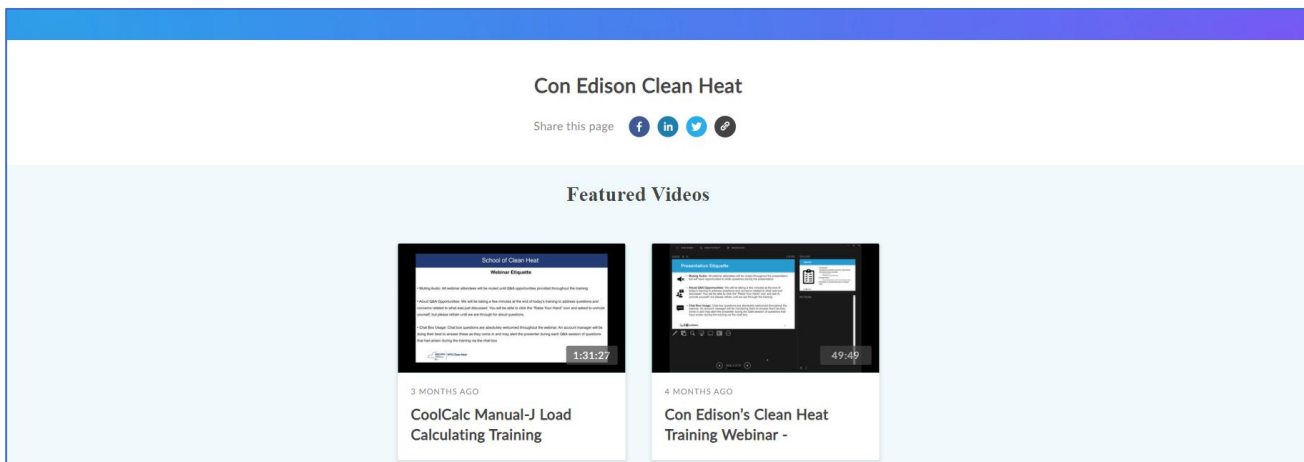
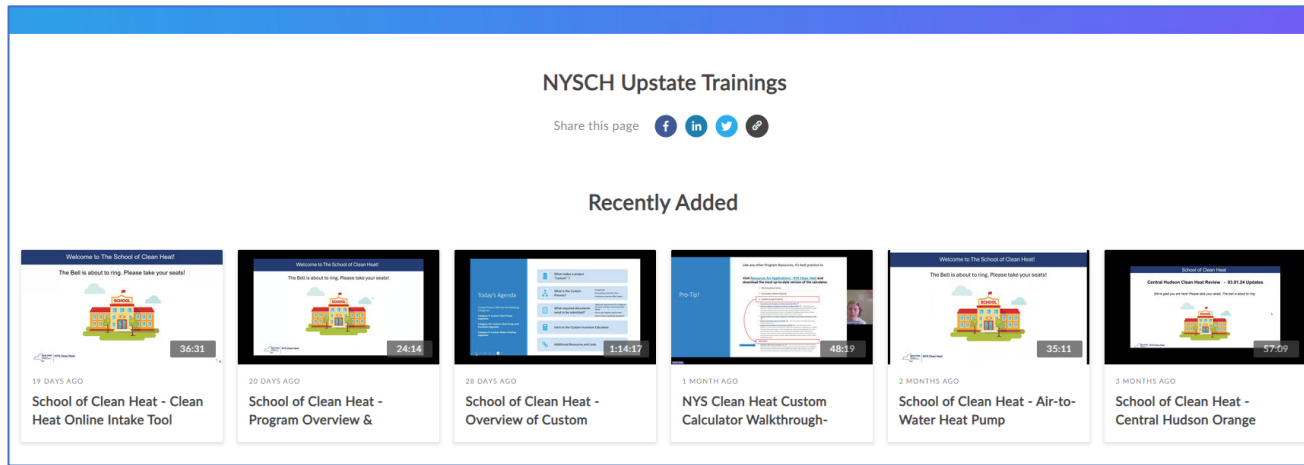
Clean Heat Online Intake Tool Overview (Avangrid/National Grid focused)

- > ICF will host a free online training on **Thursday, September 25th from 9-10 AM**
- Training will include: Submitting a rebate application and related submission details
- > You can register for the training at <https://attendee.gotowebinar.com/rt/5571086225044005209>.

Con Edison Clean Heat Program - October 2025 Webinar

- > ICF & Con Edison will host a free online training on **Tuesday, October 7th from 9-10 AM**
- The agenda will include general program updates, achievement/budget, & program manual changes
- > You can register for the training at <https://attendee.gotowebinar.com/register/7793370750963102549>.

School of Clean Heat Webinar Recordings



- > [School of Clean Heat Upstate Recordings](#)
- > [School of Clean Heat Con Edison Recordings](#)
- > Access at any time to fit your busy schedule!

School of Clean Heat Shorts Channel

Clean Heat Shorts

Quick, targeted videos to help Clean Heat contractors address and prevent common application errors

Recently Added

The screenshot displays a channel interface with four video thumbnails. Each thumbnail includes a title, a brief description, a duration, and a timestamp. The first thumbnail is titled 'Customer Acknowledgement Form' with a duration of 3:35 and a timestamp of '2 HOURS AGO'. The second is 'Missing AHRI/NEEP Certificates' with a duration of 5:53 and a timestamp of '6 DAYS AGO'. The third is 'Manual J: Design Temps Not within 5 Degrees, Missing' with a duration of 7:26 and a timestamp of '11 DAYS AGO'. The fourth is 'Relevant Action Reasons' with a duration of 4:57 and a timestamp of '11 DAYS AGO'.

Video Title	Duration	Timestamp
Customer Acknowledgement Form	3:35	2 HOURS AGO
Missing AHRI/NEEP Certificates	5:53	6 DAYS AGO
Manual J: Design Temps Not within 5 Degrees, Missing	7:26	11 DAYS AGO
Relevant Action Reasons	4:57	11 DAYS AGO

- > 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 nyscleanheat@ceadvisors.com.

Reminder: Meeting Cadence

- > The JMC has PC&IP meetings scheduled in early June, September, December, and March/April.
 - 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 and Next Steps

- > Next PC&IP meeting on **December 18, 2025** (9:00 AM-10 AM)
 - Please submit potential topics for the next Working Group by **December 11th** via email to NYSCleanHeat@ceadvisors.com or directly to your utility partner.
- > NYS Clean Heat Website - (<https://cleanheat.ny.gov/contractor-resources/>)
- > Regulatory documents
 - Related to 2020-25 Portfolio ([18-M-0084](#))
 - Related 2026-30 Portfolio ([25-M-0248](#))

Program Contact Information

> NYS Clean Heat Contacts

- **Toby Hyde**, Con Edison: HydeT@coned.com
- **Ray Cotto**, Central Hudson: rcotto@cenhud.com
- **Ryan Bauer**, National Grid: ryan.bauer@nationalgrid.com
- **Sean Dooley**, NYSEG/RG&E: sean_dooley@rge.com
- **Chris Trenard**, Orange & Rockland: trenardc@oru.com
- **Caroline Hazard**, NYSERDA: caroline.hazard@nyserda.ny.gov

> General Mailbox

- Regulatory and program inquiries: nyscleanheat@ceadvisors.com
- Application and project-specific inquiries: nyscleanheat@icf.com and (844) 212-7823

Thank you!

