

NYS Clean Heat Working Group Series

for Participating Contractors & Industry Partners

Session #3

July 15, 2021, 8:30 am–10 am

NYS Clean Heat
Joint Management Committee



NYS Clean Heat

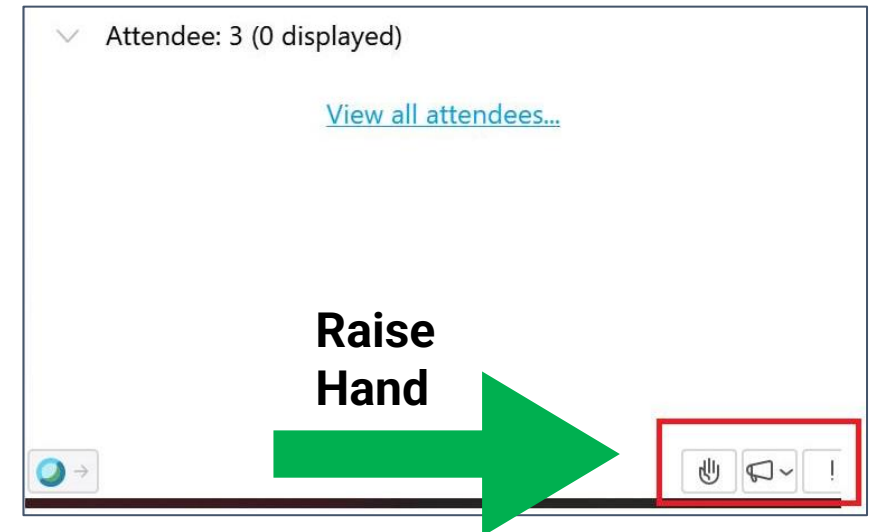
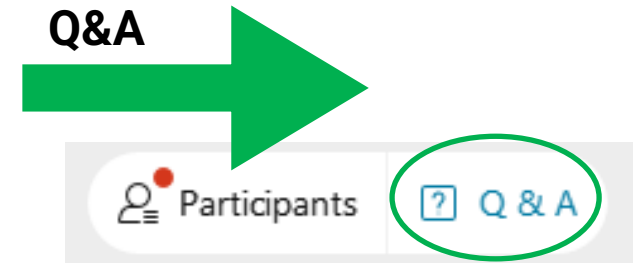
Agenda

- > **Meeting procedures** (2m)
- > **Welcome** (3m)
- > **Stakeholder-initiated topics for discussion** (5m)
- > **JMC update and discussion** (75m)
 - July 1st revisions (JMC)
 - Status updates on process improvements (ICF)
 - Con Edison and Orange & Rockland specific updates (CE/OR)
- > **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
 - > 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
 - > 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 Paul Dauderis
pdauderis@ceadvisors.com



Welcome

Joint Management Committee (JMC) Co-Chairs:

- > **William Xia**, Con Edison
- > **Wendy MacPherson**, NYSERDA

- > Other JMC Members:
 - **Ray Cotto**: Central Hudson
 - **Jennifer Cross**: National Grid
 - **Nicole Williams**: NYSEG, RG&E
 - **Mark Maloney**: Orange & Rockland

> Our implementation team today:

- **Mike L'Ecuyer**: ICF
- **Kenn Latal**: ICF
- **Ari Tatko**: ICF

> Our Working Group support team:

- **Ben Davis**: Concentric
- **Pieter Zwart**: Concentric
- **Clara-Ann Joyce**: 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

Working Group Series

Review of typical meeting format

- > **Stakeholder presentations**
 - Presentation (5m)
 - Discussion time will vary by topic (5 – 30m)
- > **Updates on previous topics** (various)

Working Group Series

Stakeholder input

- > **No stakeholder submissions this month for review**
 - *Project-specific inquiries were addressed separately via email*
 - *Program-related requests should be handled through this forum*
- > **All program-related topics are welcome**
 - *Many other stakeholders may share a similar issue*
- > **Centralized forum for transparency and issue prioritization**
 - *Program-specific inquiries: NYSCleanHeat@ceadvisors.com*
 - *Project-specific inquiries: NYSCleanHeat@icf.com*

Working Group Series

Other stakeholder input

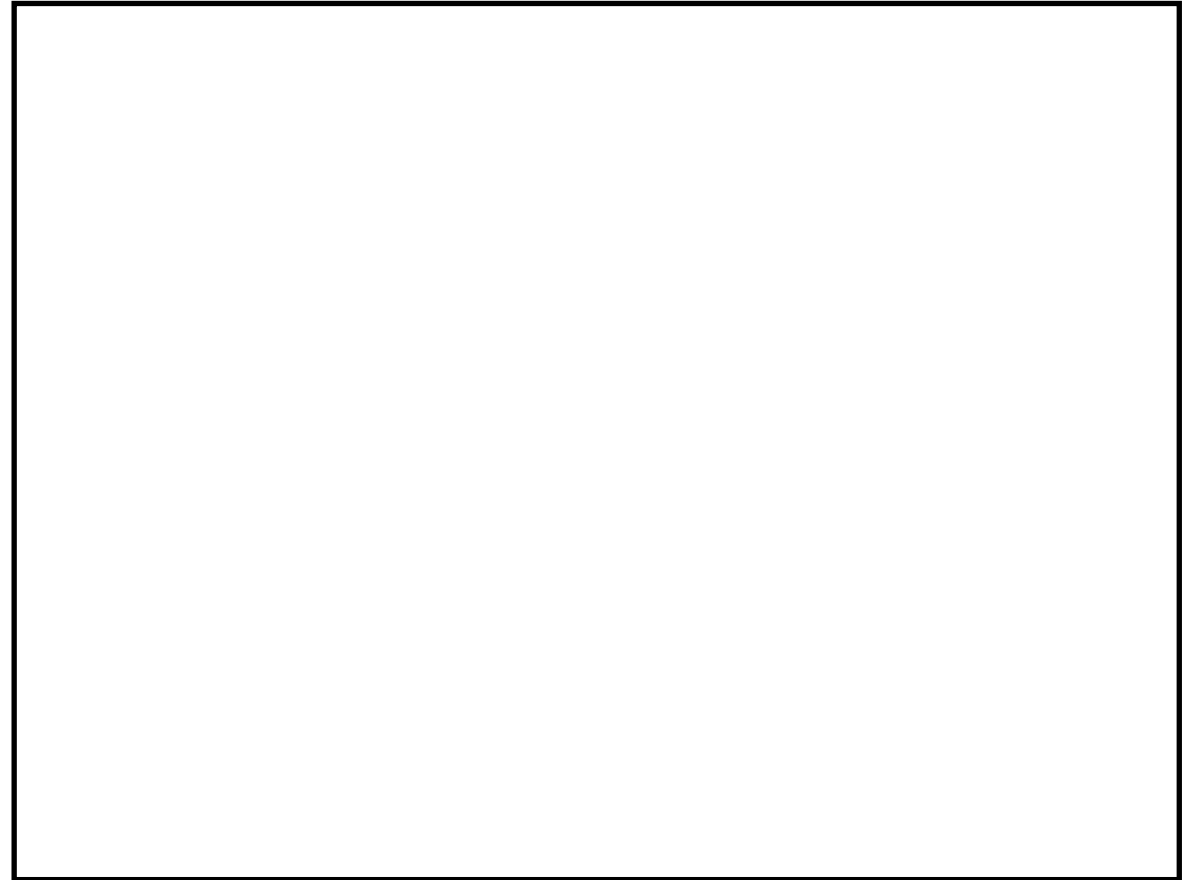
- > **Request that future program feedback include template to promote open dialogue during the Working Group**
- > **Summary of feedback received over the last few weeks**
 - Contractor recommendation that the program shift primarily to a downstream customer payment model
 - Contractor request to include additional geothermal equipment into the Custom savings calculator
 - Manufacturer requests for access to certain project and contractor data to support contractor recruitment and support, marketing
 - Manufacturer requests for expansion of integrated controls eligibility
 - Manufacturer requests to expand sales strategy for heat pump water heaters
- > **The JMC would like to work with the industry to prioritize these issues and work through them in a transparent manner**

Working Group Series

Stakeholder input template (1 of 2)

- > Speaker and stakeholder(s) represented:
- > Issue and context:

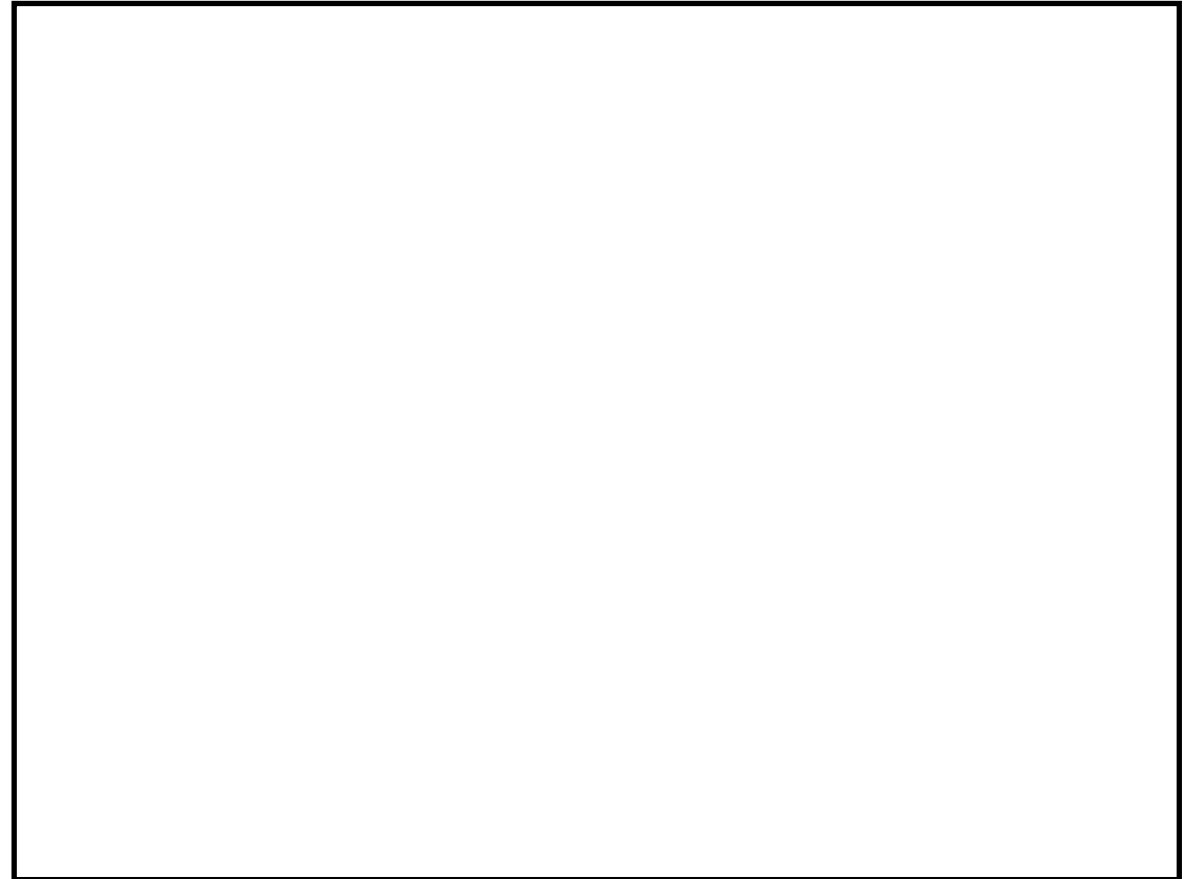
- > Proposed change / solution requested:



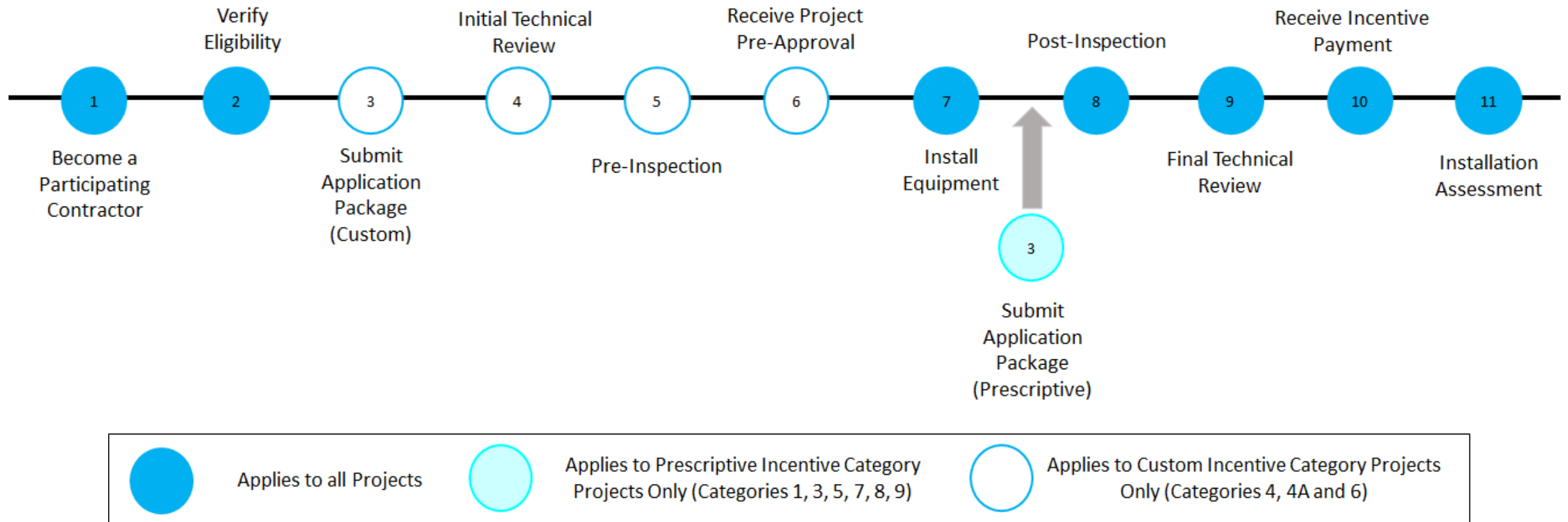
Working Group Series

Stakeholder input template (2 of 2)

- > Suggested priority level (High, Medium, or Low) with explanation:
- > Requested timing for change / solution:
- > Who else this issue affects:



July 1 Revisions – Custom process



Pre-approval required prior to installing measures that fall under Categories 4, 4A, and 6.

July 1 Revisions – Custom process

> **Additional details in the Program Manual**

- Custom project eligibility (p. 12)
- Section 3.6 – Engineering Savings Analysis Requirements for Custom Categories 4, 4A & 6 (p. 43)
- Section 4 – Participating in the Program (p. 49)

> **For scenarios in which Custom project eligibility is not clearly defined, the following shall be used to determine eligibility:**

- Fossil fuel (heating, natural gas, steam generated by fossil fuel, etc.) energy consumption must be reduced by the new electric technology or application
- The new electric technology or application:
 - 1) Must not increase the overall annual site energy consumption
 - 2) Shall be market ready and can meet or exceed applicable minimum efficiency specifications

July 1 Revisions – Custom project savings calculator

- > **The Statewide Clean Heat Program Savings Calculator assists Participating Contractors with calculating energy savings and incentives for large projects**
- > **“Version 1” is configured for:**
 - NEEP listed Cold climate single package air source heat pumps
 - NEEP listed Cold climate air source mini-splits
 - Large Unitary Air-to-Air Heat Pumps
 - Air Source Variable Refrigerant Flow (VRF) Heat Pumps
 - Large Closed Ground Loop Heat (Ground Source) Pumps with centralized ground loop pumping
- > **Calculator and User Guide are both located here, under both ASHP, GSHP**
 - <https://saveenergy.ny.gov/NYScleanheat/resources/>
- > **We welcome feedback on additional functionality to be included for Version 2**

July 1 Revisions – New "HP + Envelope" Category 4A

- > A Category 4 project that is coupled **with a significant envelope upgrade**. The envelope upgrade must produce a quantifiable impact on the heat pump sizing to be eligible for a packaged approach. When combined, the existing baseline will be used for calculating energy savings
- > **Eligible measures**
 - Exterior: window replacements, window film
 - Opaque shell: wall insulation, continuous insulation, window walls, curtain walls exterior façade
 - Air leakage sealing, air barrier continuity
 - Roof insulation

July 1 Revisions – New "HP + Envelope" Category 4A

> **Incentives on \$/MMBtu of annual energy savings**

- The MMBtu savings from both the envelope measure and the HP measures will both be paid out at the 4A rate

> **Additional details in the Program Manual**

- Utility incentives (p. 17)
- Section 3.2.5 – Envelope measures (for Category 4A: Heat Pump + Envelope) (p. 40)
- Section 3.6 – Engineering Savings Analysis Requirements for Custom Categories 4, 4A & 6 (p. 43)

> **Program Manual link:** <https://saveenergy.ny.gov/NYScleanheat/resources/>

July 1 Revisions – Custom Applications

- > **The NYS Clean Heat Resources page provides details on how to submit projects for each utility**
 - **Con Edison and National Grid**
 - Incentive applications and instructions are available for projects going through Category 4 Custom
 - **Central Hudson, NYSEG/RG&E, Orange & Rockland**
 - ICF, who will be processing custom applications for these utilities, will have applications available soon and posted to the resources page
- > **Resources link:** <https://saveenergy.ny.gov/NYScleanheat/resources/>

July 1 Revision – Field Assessments and Compliance

- > **Field Assessments provide the utilities with an opportunity to verify the heat pump system was installed according to all program requirements and to assess the quality of workmanship**
 - Language updated from QA QC to Field Assessments
 - Updated Assessment language and format
- > **The JMC has communicated with our Assessment Vendors that a notice of the scheduled Field Assessment should be sent to the Participating Contractor**
 - The Customer does have the right to request the Participating Contractor not be notified

July 1 Revision – Field Assessments and Compliance

- > **The ASHP, GSHP and HPWH checklists have been updated and are available on the NYS Clean Heat Resources page.**
 - Will have continuous review and updates as appropriate
- > **A dedicated webinar to review the updated checklists and best practices is scheduled to be held 7/27**

July 1 Revisions – Enhancements to the application process

- > **OIT now shows key application status levels, with emails if we need more information**
- > **New approach to BHL and BCL**
 - Limits lifted, allowing us to re-open projects previously outside of program bounds and approve them
 - IT tickets pending to implement the new calculation for Cat 2 & 3 projects with capacities > 120% of BHL
- > **Tracking project aging vs. goal of 20-days from approved application to payment check date**
 - ICF configuring reports this week and presenting to JMC next week; online posting to follow in early August

July 1 Revisions – Enhancements to the application process

- > **Minimize required forms to streamline contractor process**
 - Customer Acknowledgement form to be filled out early in the process – to be released next week
- > **Contractor Management Portal**
 - Basic contractor enrollment application portal will be able to function by 7/30
- > **New version of ICF “BTU Calculator” tool for smaller projects – to be expanded in Aug to:**
 - Provide design temp guidance
 - Calculate incentives including projects at >120% BHL
 - Provide snow depth guidance

Con Edison and Orange & Rockland

- > **Con Edison:** increased GSHP incentive (\$5,000 / 10,000 Btuh of HC)
- > **Additional incentive concepts offered**
 - 30% kicker incentive for HPs installed in gas-constrained areas (*effective 7/1*)
 - Optional adder incentives for 1-4 unit, full-load ASHP installs (*effective 8/1*)
 - 2A: With an integrated controls package (\$3,500 / \$2,400 / 10,000 Btuh of HC)
 - 2B: With decommissioning of existing heating system (\$5,000 / \$2,400 / 10,000 Btuh of HC)
- > **Notes**
 - Process to be established for the inclusion of additional eligible IC systems
 - An additional checklist / attestation form shall be required for decommissioning

Orange & Rockland

Heat Pump Bonus Rebates

- Category 1: \$300 per outdoor unit (limit of 10 per project)
- Category 2: \$1,500 per project (not per outdoor unit)*
- Category 3: \$2,500 per GSHP system

*Update to Footnote 10 on page 17 of the Program Manual:

“In addition to the amount shown here, O&R offers a \$1,500 incentive per condenser unit project.”

Resource – NYS Clean Heat Resources Page

Resources

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.

- [See a list of the Participating Contractors](#) 

▼ Working Group Series

▼ Training and Workforce Development

▼ Green Jobs — Green NY (GJGNY) Financing

▼ Ground Source Heat Pump (GSHP)

▼ Air Source Heat Pump (ASHP)

▼ Heat Pump Water Heaters (HPWH)

▼ Program Development, Approvals and Process Documents

▼ Standards and Field Assessments

▼ Submit Your Incentive Applications

▼ For Manufacturers

Resources link:

<https://saveenergy.ny.gov/NYScleanheat/resources/>

Resources, support, and next steps

- > Field Assessments and Compliance webinar on **Tuesday, July 27th** (1-2PM)
 - To review updated checklists and best practices
- > Next PC&IP meeting on **Thursday, August 12, 2021** (8:30 AM-10 AM)
 - Proposals for discussion at the next Working Group must be received by **August 4th**
- > NYSCleanHeat@ceadvisors.com – for *program*-related inquiries
- > NYSCleanHeat@icf.com and (844) 212-7823 for *project*-related inquiries
- > NYS Clean Heat Website - (<https://saveenergy.ny.gov/NYScleanheat/resources/>)

Resources, support, and next steps

- > **Email blasts** – twice per month
 1. Early week following Working Group: next steps, including PowerPoint and meeting notes
 2. Week prior to meeting: Agenda items and report-out on prior items
- > **Additional email blast next week for Field Assessment Webinar (Tues, 7/27)**
- > All program documents are located on the NYS Clean Heat Resources page (<https://saveenergy.ny.gov/NYScleanheat/resources/>)
- > All regulatory proceeding documents are located on the NYS DMM (<http://documents.dps.ny.gov/public/MatterManagement/CaseMaster.aspx?Mattercaseno=18-M-0084>)

Thank you!

