

NYS Clean Heat Assessment Webinar

July 2021



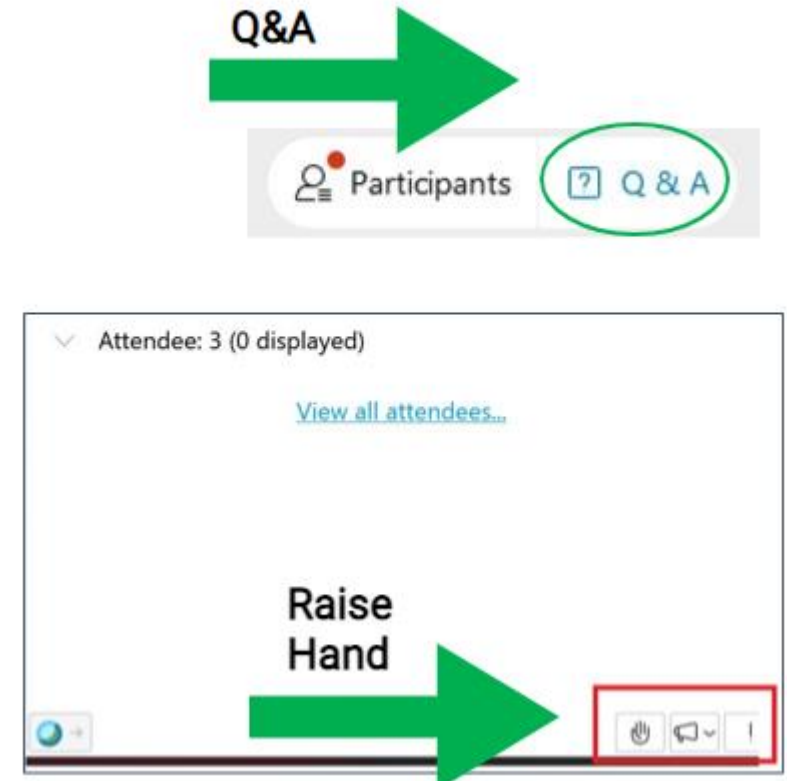
NYS Clean Heat

Agenda

- > **Meeting procedures**
- > **Welcome**
- > **Stakeholder-initiated topics for discussion**
- > **Contractor FAQs and concerns**
- > **Checklist updates**
- > **Assessment goals and criteria**
- > **Assessment scheduling**
- > **Resources, support, 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 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:

Matthew Siano, Kenn Latal, Tom Wolf, Ari Tatko, Dana Grover, Tim Walsh: ICF

Our QSP support team today:

Matthew Christie: TRC

Maria Rode: Steven Winter Associates

Our Working Group support team:

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

Stakeholder-initiated topics for discussion

- > **No stakeholder submissions on QA/QC topics for review**
- > **All program-related topics are welcome**
 - *Many other stakeholders may share a similar issue*
- > **Centralized forum for transparency and issue prioritization**
 - *Program-specific inquiries and proposals: NYSCleanHeat@ceadvisors.com*
 - *Project-specific inquiries: NYSCleanHeat@icf.com*

Contractor FAQs and concerns

Question	Answer
>Why am I being graded?	The electric utilities conduct routine field assessments to support quality installations and ensure that contractors comply with program rules.
>What does this mean and how does this impact my record and standing in the program?	All Clean Heat contractors have three initial projects selected for assessment, followed by periodic selection upon successful demonstration of program standards. All contractors are eligible to participate and provide program rebates unless otherwise notified due to continued lack of correction of identified nonconformances.
>Minor items that don't impact safety or function are resulting in failures.	The Joint Management Committee has identified issues raised and updated the Assessment Checklists accordingly.
>I have no communication or notice of assessments before they occur.	We have worked with Quality Service Providers to encourage customers to allow for contractors to participate in onsite assessments, and provide advanced notice (>5 days) of such visits.
>The reports being received are not always consistent/ in the same format.	The Joint Management Committee is working with the Quality Service Providers to unify the format of Assessment reports for increased clarity and transparency.

ASHP checklist updates

- > **Expanded upon refrigerant line set insulation requirements**
 - No more than 1" of any refrigerant line should be unprotected at the outdoor unit connection. (Minor)
 - > 12 inches of any accessible, unprotected refrigerant line from the outdoor unit connection = (Major)
- > **Account for top and bottom vs side clearance for ASHP terminal units**
 - Each must meet manufacturer installation requirements and be suitable for proper function
 - Side clearance < manufacturer specs deemed minor nonconformance
- > **Ductwork sealing and insulation enforced if outside of building thermal envelope**
 - Only enforced within building envelope
- > **Updated snow depth guidance for each zip code based on nearest ACCA weather station**
- > **Separate item for vibration dampeners connected to building frame vs level installation of outdoor units**
- > **Removed code documentation and items covered elsewhere in project application process**

GSHP checklist updates

- > Current checklist (from February 2021) reflects updates made in response to stakeholder feedback
- > Recognize that additional revisions are necessary to streamline the process
- > Welcome additional stakeholder feedback to help us identify, prioritize, and finalize additional updates needed
 - Confirm accompanying documentation requirements, applicable inspection line items, etc.
 - If you wish to be a part of this Working Group please reach out to NYSCleanHeat@ceadvisors.com

Assessment goals and criteria

- > Grow heat pump market and consumer confidence with dependable, quality installs
- > Provide feedback and identify opportunities for improvement and efficiencies
- > Constructive, corrective vs punitive
- > Increase communication between contractors, program administrators, and QSPs
- > Support Clean Heat contractors and address ongoing feedback and concerns while ensuring projects installed to Clean Heat standards.
- > Projects reports scored based on identified nonconformances needing corrective action.
 - "Meets Program Standard" or "Below Program Standard"
- > Reports to highlight corrective actions needed and future improvement

Assessment scheduling

- > QSPs to encourage customers to invite installer to onsite field assessments
 - To emphasize assistance in explaining project-specific nuance or outstanding questions.
 - Minimum 5 days of notice provided to each party prior to visit
 - Ultimate decision up to customers on whether to include installer
- > First three projects selected for assessment for all NYS Clean Heat contractors
 - If all successful, future projects periodically selected at random
- > If major nonconformances found, 3 additional assessments scheduled to confirm resolution
 - If three consecutive assessments are completed with no major nonconformances, future projects will be selected periodically, at random.

Resources, support, and next steps

- > All checklists and documents found on the NYS Clean Heat Resources page
 - <https://saveenergy.ny.gov/NYScleanheat/resources/>
 - <https://saveenergy.ny.gov/NYScleanheat/assets/pdf/Quality-Policies-Procedures.pdf>
 - <https://saveenergy.ny.gov/NYScleanheat/assets/other/Air-Source-Heat-Pump-Checklist.xlsx>
 - <https://saveenergy.ny.gov/NYScleanheat/assets/other/Ground-Source-Heat-Pump-Checklist.xlsx>
- > New checklists to take effect **August 1st**
- > Policies and Procedures document to be updated on **August 13th**
- > For concerns related to Assessment scores, please continue to communicate with your Account Manager
- > Next monthly Participating Contractor and Industry Partners webinar is on **Thursday, August 12th** (8:30 AM-10 AM)