

NYS Clean Heat Working Group Series

for Participating Contractors & Industry Partners

Session #5

September 9, 2021, 8:30 am–10 am

**NYS Clean Heat
Joint Management Committee**



NYS Clean Heat

Agenda

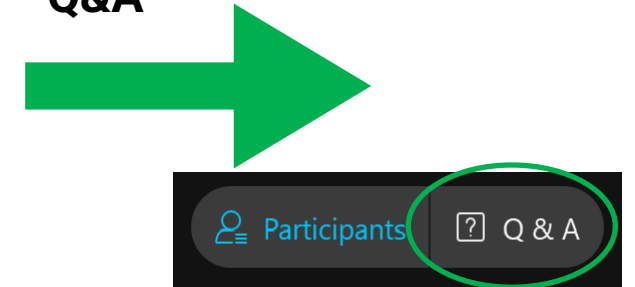
- > **Meeting procedures** (2m)
- > **Welcome** (3m)
- > **Stakeholder-initiated topics for discussion** (40m)
 - Increasing contractor participation in the program (NY-GEO and BPCA)
- > **JMC update and discussion** (40m)
 - ICF Detail on Implementation Items
 - 10/1 PM Update
- > **Resources, support, 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
 - > Hover your mouse over your name in the Attendees list in order to see the Raise Hand icon displayed
 - > 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
 - > 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

Q&A



Raise Hand



Welcome

Joint Management Committee (JMC) Co-Chairs:

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

- > Other JMC Members:
 - **Ray Cotto**: Central Hudson
 - **Ayomide Balogun**: 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 template (1 of 5)

> Speaker and stakeholder(s) represented:

Bill Nowak – NY-GEO

Hal Smith – Building Performance Contractors Association

> Issue and context:

To meet NY's goals, we need to rapidly increase the # of contractors installing GSHPs and ASHPs. Current HP contractors are experiencing the level of paperwork and other time-consuming elements as a deterrent, and there may be significant numbers of heat pumps being installed outside the rebate program. Fossil fuel HVAC contractors are not stepping forward to install heat pumps.

> Proposed change / solution requested:

A joint industry/JMC working group to holistically create an inviting process to double the number of contractors installing heat pumps and halve the time and effort from current processes

Working Group Series

Stakeholder input template (2 of 5)

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

High priority as the time and effort required to participate are deterrents to meeting NY's goals.

Establish the working group by September 16 with a direction to propose recommendations at the October and November JMC stakeholder meetings.

Primarily contractors, but importantly everyone impacted by the climate emergency

Working Group Series

Stakeholder input template (3 of 5)

Time and effort consuming processes include:

- the paperwork required to apply for rebates,
- the effort and time it takes to shepherd applications to approval, and
- a burdensome field assessment process.

The JMC has taken good steps responding to NY-GEO's proposals on the timing of application approvals, and we look forward to forthcoming responses from the JMC on the field assessment process.

It would be very helpful to take a holistic view of what it would take to encourage more participation for HVAC contractors from both the renewable and fossil fuel sectors.

Working Group Series

Stakeholder input template (4 of 5)

Suggestions on the application process are numerous and too detailed for a slide or two, but can be grouped in 3 categories

A better method to make and communicate changes to the application process. They are frequent and hard to track.

An improved, uniform, smarter On-Line Intake Tool

Establishment of workable communication media for contractors who may need phone or other media as opposed to email

Working Group Series

Stakeholder input template (5 of 5)

It would be very helpful to take a holistic view of what it would take to encourage more participation for HVAC contractors from both the renewable and fossil fuel sectors.

Some suggestions:

A listening session for fossil fuel HVAC contractors to give their perceptions of transitioning to renewables

A mentoring program for guiding HVAC contractors to renewable heating


Services that could be provided/contracted for by utilities to help equipment installers – Example is Otter Tail Power Company's program covering loop installation, leaving installation contractors comfortable with their usual function of indoor installations.

ICF Improvements

- > Processing Timeline Focusing on Tracking Project Aging
 - Now processing with highest priorities given to applications that have aged the most – focus has been to configure and generate internal reports identifying individual projects, across all of the utilities
 - Working with JMC to design reports showing overall project aging from application receipt to completion – JMC to give instructions on next stage of aging reports (last report requested by JMC didn't measure whole processing cycle)
- > OIT Improvements
 - ICF is working to include current status age in the OIT dashboard
 - Contractors will be able to see how long each project in their list has been in the current status – by week of 9/20
 - Updates to zonal load fields – critical for accurate energy savings calculations
 - Optional field: system will allocate zonal loads accurately – no need for contractor to enter them – fields will say “Optional” on the OIT screen
- > Communication methods
 - Moving on suggestion to send text messages regarding projects via text – targeting mid-October
 - Looking into possibility of sending text messages on general announcements

5 Tips for Submitting a Successful Application

- > Customer Sign Off
 - Customer Acknowledgement Forms **MUST** be completed and signed by customers for ALL projects regardless of the utility territory
- > Equipment Photos
 - Take photographs of installed equipment as well as nameplate photos showcasing model and serial numbers
- > QA/QC Checklist
 - Review and use the QA/QC checklists ensuring all staff install with program guidelines in mind – Avoid the need to correct things later and do it right the first time!
- > Manufacturer Data or Clean Heat Calculator
 - Show the equipment capacity at the project's Manual J Design Temp with uploaded manufacturer data sheets or the user-friendly Clean Heat Calculator
- > Name & Address
 - Name/Address on utility account **MUST MATCH** the name/address on invoice and in the OIT



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ACCOUNT BALANCE	
Previous Balance	
Payment Received on NOV 20 (AC)	
Current Charges	

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 NYSCleanHeat@icf.com 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 Ed:** Will Xia, Program Manager, Phone: (646) 761-1851, Email: xiaw@coned.com
- > **National Grid:** Peter Hoffman, Program Manager,
Phone: (518) 433-5221 or (518) 227-5655, Email: peter.hoffman@nationalgrid.com
- > **NYSEG/RG&E:** Nicole Williams - Program Manager, Conservation and Load Management
Phone: 585-484-6592, Email: nicole.williams@nyseg.com
- > **Orange & Rockland:** Mark Maloney Phone: (845) 577-2433, Email: maloneym@oru.com

Program Manual Update – 10/1

- > Con Edison / Orange & Rockland adders
 - Integrated controls eligibility criteria
 - <https://saveenergy.ny.gov/NYScleanheat/assets/pdf/NYS-Clean-Heat-Integrated-Controls-Eligibility-Guidance-Con-Edison-Orange-Rockland.pdf>
 - QPL: working list to be uploaded soon
 - Decommissioning checklist
 - <https://saveenergy.ny.gov/NYScleanheat/assets/pdf/NYS-Clean-Heat-Decommissioning-Requirements-Checklist-Category-2B-Con-Edison-Orange-Rockland.pdf>
- > Category 4A: HP + envelope
 - Thresholds for eligibility, process for calculating savings, anticipated release of envelope calculator
- > Incentive updates
 - Latest PM will have updated table of incentives including previous changes from errata page
 - Con Edison category 1 decreased from \$500/ unit to \$250/ unit including \$125 per unit contractor reward.
 - Con Edison category 2 decreased from \$2,000/ 10,000 Btuh to \$1,000/ 10,000 Btuh including \$500 per project contractor reward.
- > Previously-identified errata
 - All previous updates will be incorporated in 10/1 PM update
- > Clarity on eligibility criteria for other category 4 heat pump technologies including:
 - Single package vertical heat pumps, ground source VRF, and energy recovery ventilators

Resources, support, and next steps

- > Next PC&IP meeting on **Thursday, October 14, 2021** (8:30 AM-10 AM)
 - Proposals for discussion at the next Working Group must be received by **October 4th** and can be submitted to NYSCleanHeat@ceadvisors.com.
- > 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
- > 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!

