

# **NYS Clean Heat Working Group Series**

for Participating Contractors & Industry Partners

Session #8

December 16, 2021, 8:30 am–10 am

**NYS Clean Heat  
Joint Management Committee**



**NYS Clean Heat**

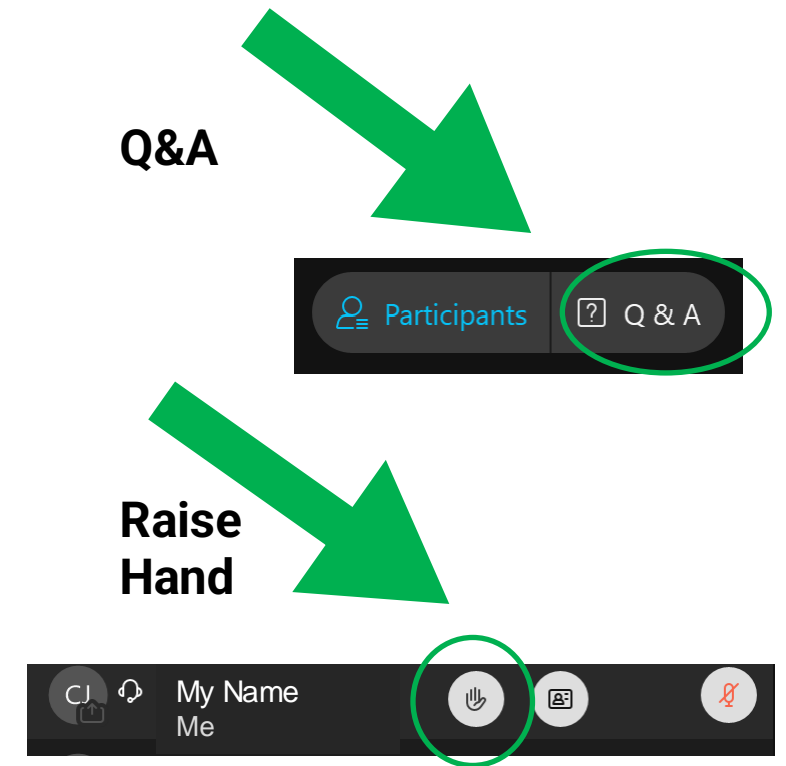
# Agenda

- > **Meeting procedures**
- > **Welcome**
- > **JMC updates and discussion**
  - Central Hudson, Con Edison, and Orange & Rockland incentive updates (60 min)
    - Additional context and feedback
    - Process improvements going forward
  - Standing topics and follow-ups (25 min)
    - Project cycle time update
    - OIT status updates
    - Follow-ups from 11/18 PC&IP
- > **Resources, support, and next steps (5 min)**
  - Gift giving policy

# 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](mailto:pdauderis@ceadvisors.com)



# Welcome

## Joint Management Committee (JMC) Co-Chairs:

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

## > Other JMC Members:

- **Ray Cotto**: Central Hudson
- **Steve Coulter**: Con Edison
- **Jennifer Cross**: National Grid
- **Nicole Williams**: NYSEG, RG&E
- **Mark Maloney**: Orange & Rockland

## > Our implementation team today:

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

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

# Residential Clean Heat Incentive Changes

- > Central Hudson, Con Edison, and Orange & Rockland have announced incentive changes for Category 1, 2, 2a and 2b residential (1-4 unit) projects installed **on or after March 1, 2022**
  - Central Hudson will begin offering a 2b adder incentive for ASHP full load heating + decommissioning on March 1, 2022
- > The incentive reductions are in response to the rapidly increasing and strong market activity in these Categories within the three utilities' service territories
- > These are necessary adjustments to support the continued growth of all segments of the market, while managing program costs within the utility budgets prescribed by the State's New Efficiency: New York proceeding
- > **No** changes to
  - GSHP, HPWH incentives, or custom categories
  - National Grid and NYSEG/RG&E incentives

# Clean Heat Incentive Changes effective March 1, 2022

Central Hudson				
		Total Incentives		
Category	Description	Current	Effective 3/1/2022	Unit
1	ccASHP: Partial Load Heating	\$500.00	\$200.00	\$ / Unit
2	ccASHP: Full Load Heating	\$1,300.00	\$500.00	\$ / 10,000 Btu/h
2a	ccASHP: Full Load Heating + Integrated Controls	-	-	\$ / 10,000 Btu/h
2b	ccASHP: Full Load Heating + Decommissioning	-	\$1,000.00	\$ / 10,000 Btu/h

Participating Contractor Reward*	
Current	Effective 3/1/2022
\$100 / Unit	\$100 / Unit
\$500 / Project	\$300 / Project
-	-
-	\$500 / Project

Incentive Change
No Change

Con Edison				
		Total Incentives		
Category	Description	Current	Effective 3/1/2022	Unit
1	ccASHP: Partial Load Heating**	\$250.00	\$100.00	\$ / Unit
2	ccASHP: Full Load Heating**	\$1,000.00	\$500.00	\$ / 10,000 Btu/h
2a	ccASHP: Full Load Heating + Integrated Controls	\$3,500.00	\$1,000.00	\$ / 10,000 Btu/h
2b	ccASHP: Full Load Heating + Decommissioning	\$5,000.00	\$2,700.00	\$ / 10,000 Btu/h

Participating Contractor Reward*	
Current	Effective 3/1/2022
\$125 / Unit	\$50 / Unit
\$500 / Project	\$300 / Project
\$2,000 / Project	\$750 / Project
\$3,500 / Project	\$2,500 / Project

Orange & Rockland				
		Total Incentives		
Category	Description	Current	Effective 3/1/2022	Unit
1	ccASHP: Partial Load Heating	\$500.00	\$200.00	\$ / Unit
2	ccASHP: Full Load Heating	\$1,600.00	\$700.00	\$ / 10,000 Btu/h
2a	ccASHP: Full Load Heating + Integrated Controls	\$2,400.00	\$1,200.00	\$ / 10,000 Btu/h
2b	ccASHP: Full Load Heating + Decommissioning	\$2,400.00	\$1,800.00	\$ / 10,000 Btu/h

Participating Contractor Reward*	
Current	Effective 3/1/2022
\$250 / Unit	\$100 / Unit
\$500 / Project	\$500 / Project
\$1,000 / Project	\$750 / Project
\$1,000 / Project	\$1000 / Project

- > New incentives apply to projects installed on or after March 1, 2022
- > To qualify for the current incentive level for projects installed before March 1, 2022, contractors must submit completed applications by April 15, 2022
- > Con Edison incentive changes apply to residential (1-4 family) projects only
- > Redlined changes to incentive tables posted on NYS Clean Heat Resources page [here](#)
- > Program Manual v6 update filed March 1, 2022

\*A portion of the Total Incentive that may be retained by the Participating Contractor  
 \*\*Con Edison incentive changes apply to Residential (1-4 Family) projects; no change to the Con Edison Category 1 and 2 incentives for other project types



# Additional incentive change context and feedback

- > Incentive amounts are set by each utility, based on the individual budgets in the New Efficiency: New York proceeding and reflect achievement, market activity and characteristics within territories
  - Changes are being made to Categories 1 & 2 in response to increased ASHP activity driving budgetary concerns
  - Utilities are reallocating funding to support the Clean Heat program's continued growth and will continue to explore budget flexibility as an option
- > Ongoing Clean Heat coordination with Statewide Low-to-Moderate-Income (LMI) Portfolio program to consider future program improvements to benefit LMI customers and communities
- > **Multiple parties have submitted feedback and requested discussion:**
  - RYCOR
  - Absolute Comfort
  - Open forum

# Process for future incentive changes

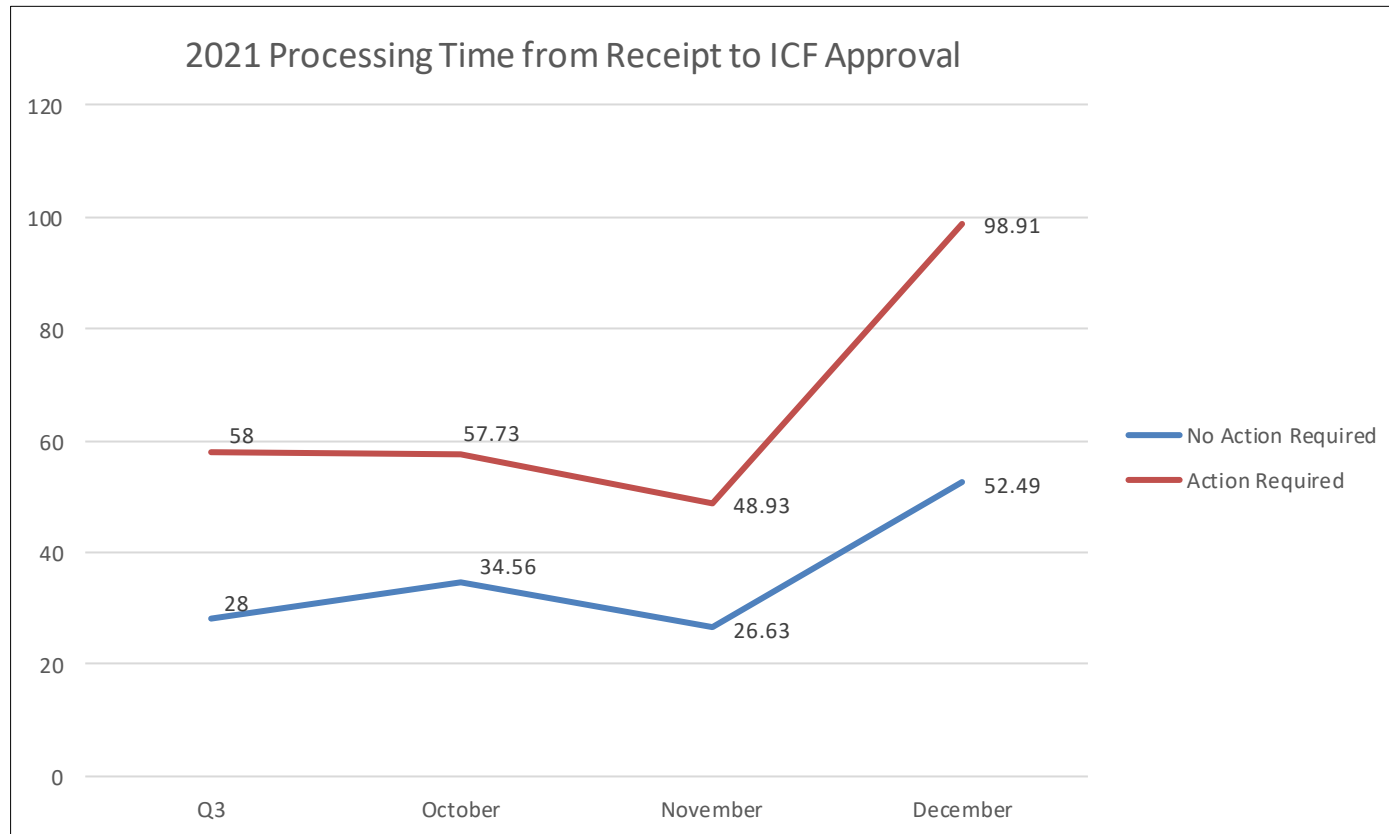
**NYS Clean Heat JMC agreed on a consistent, structured process – no more than twice a year on a set cadence, with market notification about 3 months in advance**

1. Changes effective March 1<sup>st</sup> with a planned notification date around December 1<sup>st</sup>
2. Changes effective September 1<sup>st</sup> with a planned notification date around June 1<sup>st</sup>
  - For prescriptive projects installed prior to the effective date of an incentive change, there will be a 45-day grace period after the effective date to submit applications at previous rates
  - Utilities retain flexibility on incentive level setting, but all changes must be made on this cadence (*including adders, promotions, bonuses, etc.*)

## **Rationale**

- > Better for setting expectations for key stakeholders (*contractors, implementation vendors, industry partners, regulators*)
- > Offers certainty to the market over key sales cycles (*in place through high volume periods*)
- > Provides ample notice in advance of changes

# ICF Process Cycle Times for Completed Projects



- > Reported by Quarter previously, now by month
- > Processing times go up in the short run due to focus on processing older projects, then come down
- > November-December clean-up causing drastic increase in statewide stats:
  - Leniency temporarily provided by Con Edison (pictures, checklist, Acknowledgement Forms, sizing, etc.) accounting for >80% of projects in December
  - Older project data appear to be mis-assigning projects to “No Action Required” cohort
  - 43% of “No Action Required” projects processed in December were processed in  $\leq 20$  days
- > Q4 average processing time for other utilities (much less clean-up) is 17.99 days for projects not requiring action and 47.73 days for project that required attention

# OIT Improvements Status Update

Improvement	Feasibility	Notes	Estimated ETA	Contractor Priority % High	Contractor Priority % High + Medium
Add glossary of status terms to OIT	High	Discussed in 10/14 webinar - underway	12/20/2021	NA	
Tips on OIT fields	Medium	Looked at hover help, but problematic across fields - ICF posting guidance language on each page.	12/20/2021	8.3%	58.3%
Con Ed and ORU Category 2A and 2B Fields	High	Top priority b/c the categories are now active in the program - no incentives, no savings	1/10/2022	NA	
Avangrid LMI fields	High	LMI Program and Ancillary Services Cost - limited volume and ICF is handling LMI inputs manually for now.	1/10/2022	NA	
Activate Note Field for contractors to use when they fill out the initial application	High	ICF can turn on Notes field for new applications, in addition to when an application needs attention	1/10/2022	50.0%	91.7%
Add total project aging on the OIT dashboard		ICF will look at substituting age for create date	1/10/2022	NA	NA

# OIT Improvements Status Update

Include equipment model and serial number on summary and submit page	Medium	Would have to code for all ICF OITs	5/1/2022	16.7%	71.7%
Cloning Measures	Medium	Planning to develop such that only serial number will need to be entered for the cloned equipment - new functionality coded for all ICF OITs	5/1/2022	41.7%	75.0%
Smarter existing equipment type entries, based on fuel type entry	Medium	Inquiry underway on feasibility of restricting equipment type DDL based on fuel type field	5/1/2022	33.3%	75.0%
Column for project Ref ID not wide enough	Medium	Columns can be hidden to widen remaining columns (this would go back to default, however); other option is to export to Excel manually. IT team is developing a report solution.	5/1/2022	25.0%	41.7%
Make all versions of OIT identical	High	Make small changes identified by ICF review or contractor comment. Longer term: common OIT platform, combined w better JMC program design harmonization	Integrated into sprints  Common Platform August 2022	58.3%	75.0%
Deploy bulk upload tool like the one deployed for Con Ed	High	The OIT bulk upload tool is complex b/c of attachment capability - requires one OIT platform.	August-September 2022	33.3%	66.7%

# Follow-up resources from 11/18 PC&IP Meeting

## > **Follow-up resources:**

- OIT Status Glossary is posted on the OIT documents page here ([Clean Heat OIT Status Glossary \(programprocessing.com\)](http://programprocessing.com))
- A step-by-step guide for the OIT is available on the Help page of each utility's OIT tool
- ACH payment application guidance is being prepared to post week of 12/20

# Resources, support, and next steps

- > Next PC&IP meeting on **Thursday, January 13<sup>th</sup>, 2021** (8:30 AM-10 AM)
  - Proposals for discussion at the next Working Group must be received by **January 6<sup>th</sup>** and can be submitted to [NYSCleanHeat@ceadvisors.com](mailto:NYSCleanHeat@ceadvisors.com).
- > [NYSCleanHeat@ceadvisors.com](mailto:NYSCleanHeat@ceadvisors.com) – for *program*-related inquiries
- > [NYSCleanHeat@icf.com](mailto:NYSCleanHeat@icf.com) and (844) 212-7823 for *project*-related inquiries
- > NYS Clean Heat Website - (<https://saveenergy.ny.gov/NYScleanheat/resources/>)

# 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](mailto: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](mailto:RCotto@cenhud.com)
- > **Con Ed:** Will Xia, Program Manager, Phone: (646) 761-1851, Email: [xiaw@coned.com](mailto:xiaw@coned.com)
- > **National Grid:** Jennifer Cross, Senior Program Manager  
518-433-5034, Email: [Jennifer.Cross@nationalgrid.com](mailto:Jennifer.Cross@nationalgrid.com)
- > **NYSEG/RG&E:** Nicole Williams - Program Manager, Conservation and Load Management  
Phone: 585-484-6592, Email: [nicole.williams@nyseg.com](mailto:nicole.williams@nyseg.com)
- > **Orange & Rockland:** Mark Maloney Phone: (845) 577-2433, Email: [maloneym@oru.com](mailto:maloneym@oru.com)



# 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>)

# Gift giving policy

- **The Utilities and NYSERDA have a “no gift” standard and cannot accept gifts**
  - These guidelines apply to all utility employees **and** vendors supporting the utility programs (implementation vendors, QA/QC inspectors, etc.)
  - “No gift” standard including cash, tips, or cash equivalents including gift cards

# Thank you and have a happy holiday season!

