

# **NYS Clean Heat Working Group Series**

for Participating Contractors & Industry Partners

Session #9  
January 13, 2022, 8:30 am–10 am

**NYS Clean Heat  
Joint Management Committee**



**NYS Clean Heat**

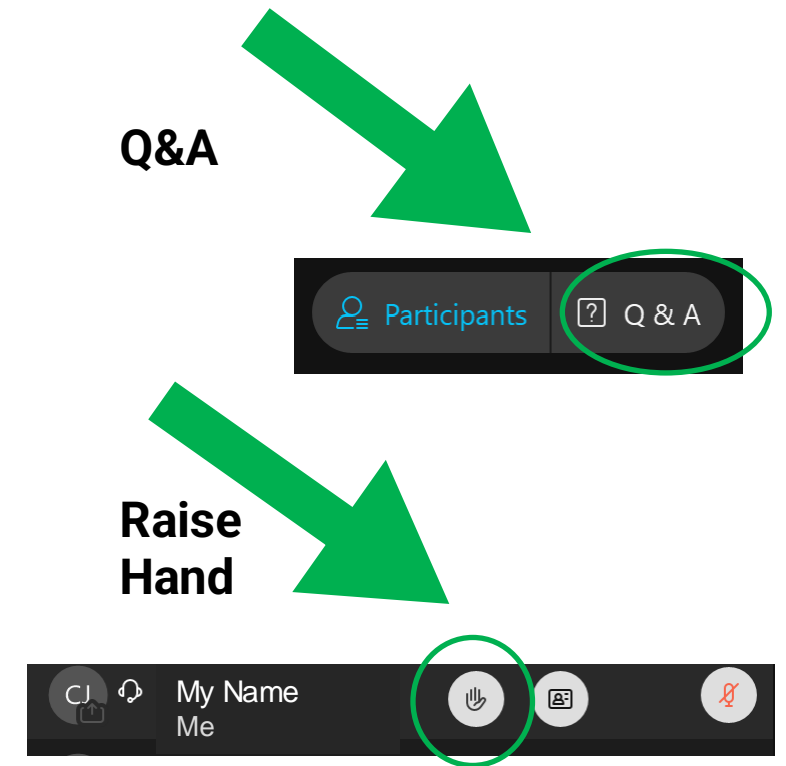
# Agenda

- > **Meeting procedures**
- > **Welcome**
- > **Safety Message**
- > **JMC updates and discussion**
  - New 2022 required training
  - Online Intake Tool (OIT) status updates
  - ICF process cycle times for completed projects
  - Follow-ups from 12/16 meeting
- > **Stakeholder presentations**
  - *Aaron Jaker*, Vigilante Plumbing, Heating & Air Conditioning
- > **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
  - > 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:

- > **Will Xia**, Con Edison
- > **Donovan Gordon**, 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)

# Safety Message – COVID-19

- > We are in a winter surge in COVID-19 cases in New York state, driven by the rapid spread of the Omicron variant
- > We want to remind all Participating Contractors to continue to follow [New York State Health Department](#) and [CDC](#) guidelines and regulations in order to prevent the spread of COVID-19
- > We encourage Participating Contractors to take extra precaution and use good judgement – particularly when visiting customer homes and sites – in order to protect yourself and our customers, including:
  - Maintaining social distancing
  - Wearing your face covering
  - Frequent hand washing and following good hygiene practices

# New 2022 required training – Cold Climate ASHP Sizing and Design

- > **Effective January 1, 2022, in addition to all other enrollment requirements, all new ASHP installers seeking to become a NYS Clean Heat Program Participating Contractor must also provide documentation that they've completed an ASHP manufacturer-sponsored Cold Climate ASHP Sizing and Design Training requirement**
  - NYS Clean Heat also strongly urges all participating contractors who enrolled prior to January 1, 2022 to take advantage of this training opportunity
- > **NYSDERDA developed a [course curriculum](#) guide and [training presentation content](#) and introduced it to ASHP manufacturers in April, with the understanding that this training would be delivered by these manufacturers through their existing training channels**
  - Utilizing the course curriculum guide, manufacturers had the option to create a standalone module, or embed into a broader training
  - Manufacturers could use an off-the-shelf, brand agnostic training available to use outright, or adapt from
  - With no current listing of these training offerings available, contractors are encouraged to reach out to their distributor or manufacturer representative for details on the availability of trainings



# Online Intake Tool (OIT) Improvements Status Update

Improvement	Feasibility	Notes	Estimated ETA
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	1/18/2022
Avangrid LMI fields	High	LMI Program and Ancillary Services Cost - limited volume and ICF is handling LMI inputs manually for now.	1/18/2022
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	1/18/2022
Add total project aging on the OIT dashboard	Medium	ICF will look at substituting age for create date	3/1/2022

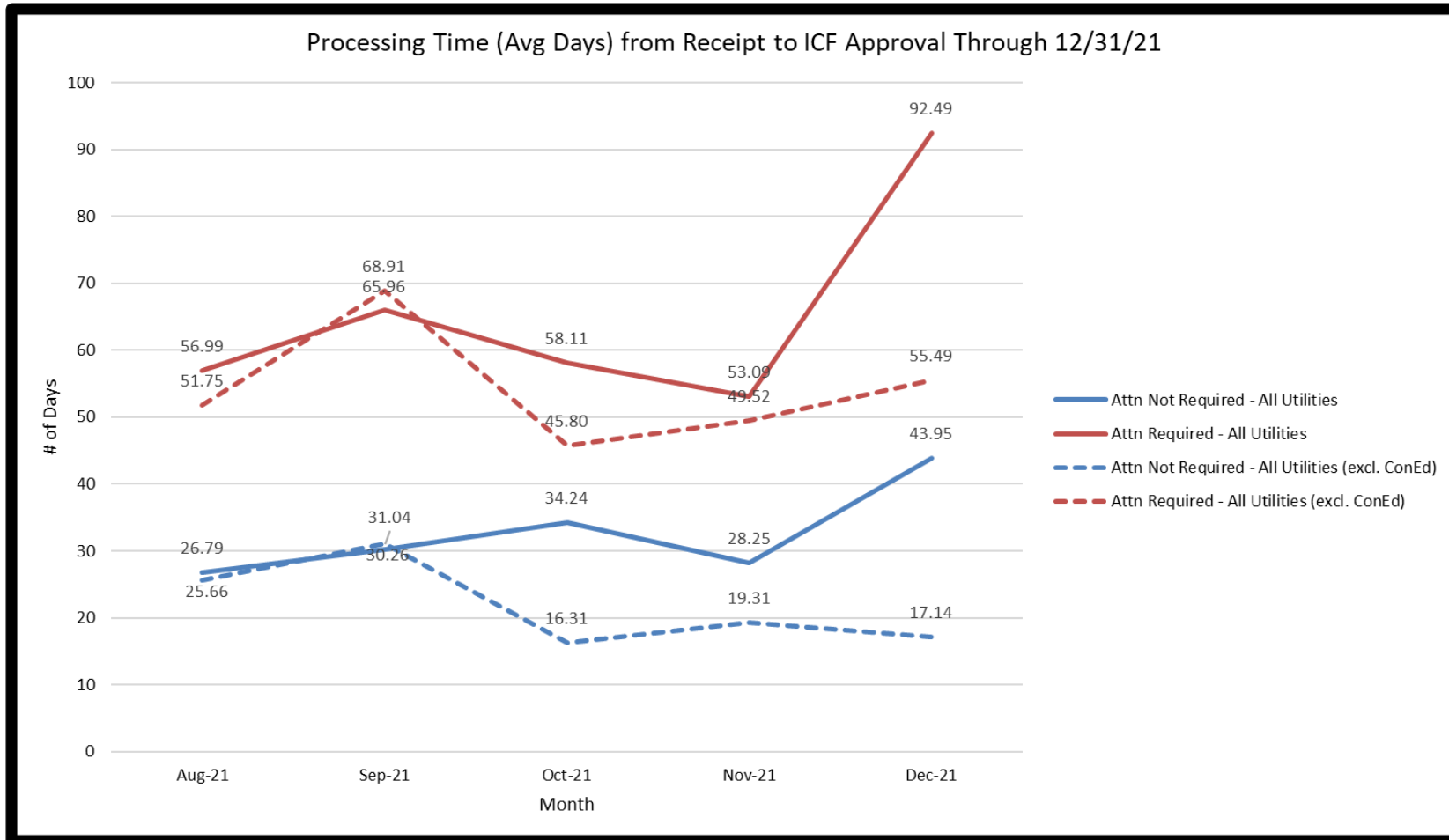
- > Previous sprint items completed in 2021
  - Filtering on dashboard, exporting data, adjusting columns, premise info in emails, deploy text messages, coordination of messaging with OIT changes, HPWH OIT alternatives, status glossary, tips on fields, aging of current status
- > First three 1/10/2022 items started testing together, but have had some issues – reset to early next week (1/18, day after holiday)
- > Last item (add total project aging) led to questions back from IT team with regards to how to handle projects that are completed – don't want them to keep aging but difficult to freeze the number, so we are looking to set timing to 0 if project is completed and paid out. Firming up new ETA with IT team

# OIT Improvements Status Update

Improvement	Feasibility	Notes	Estimated ETA
Include equipment model and serial number on summary and submit page	Medium	Would have to code for all ICF OITs	5/1/2022
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
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
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
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
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

- > 5/1 Items unchanged on schedule
- > Also focusing right now on the “OIT identical” tasks – currently on harmonizing the order of fields, identified as the key issue, dates TBD but no later than 5/1

# 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 focusing on Con Edison's older projects
  - Also focused on resolving older projects for other utilities in Nov-Dec

# Follow-up resources from 12/16 meeting

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

- OIT Status Glossary is posted on the OIT documents page here ([Clean Heat OIT Status Glossary \(programprocessing.com\)](https://www.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 posted on the NYS Clean Heat Resources page under Working Group Series – General Reference ([ACH Payment Guidance](#))

# Clarifications regarding March 1, 2022 residential incentive changes

**We received questions from several participants in last month's webinar asking why incentives are changing on March 1, 2022, and would like to provide the following clarifications:**

- The Clean Heat program saw impressively rapid growth in Central Hudson, Con Edison, and Orange & Rockland service territories in 2021. For Central Hudson and Con Edison, incentive expenditures have significantly exceeded their 2021 utility budgets and are approaching the total budgets for the entire program term (through 2025). The incentive changes were made to manage the utilities' remaining authorized Clean Heat program budgets.
- The utilities did not come to the decision to decrease incentives lightly. We are committed to ensuring the long-term success of the Clean Heat program by managing each utility's budget as prescribed by New York State's New Efficiency: New York Order, which supports all customer segments and applicable technology categories.
- The goal of the Category 2 ASHP incentive adders for integrated controls and decommissioning is to incentivize full-load systems that are both installed and used for heating, in accordance with statewide policies. The utilities encourage contractors to continue to build business models around selling and installing systems used as the building's primary or only heating source, and to take advantage of the Category 2 ASHP adders where applicable.
- Description of all changes are located [here](#)

# Stakeholder Presentations

- > Aaron Jaker, Vigilante Plumbing, Heating & Air Conditioning

# Working Group Series

## *Stakeholder input template (1 of 2)*

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

### Aaron Jaker, Vigilante Plumbing, Heating & Air Conditioning

We currently have 4 full load Clean Heat projects in our pipeline that have already been contracted. **Due to the current supply chain situation**, our main supplier as well as other suppliers are having difficulty obtaining the equipment we need, some suppliers saying they won't have the equipment until April 2022. We have the manpower and are ready to begin work, we simply cannot acquire the equipment. If this is the case, we will be unable to meet the March 1<sup>st</sup> incentive change deadline for these projects. The 4 clients are now considering canceling their participation in the program and retaining their fuel burning equipment, since we cannot keep the promise of the current incentives. This is completely out of our control.

# Working Group Series

## *Stakeholder input template (2 of 2)*

> Proposed change / solution requested:

**The program should allow contractors to submit already signed contracts to the program, along with a letter from the supplier detailing why we cannot obtain the equipment in time for March 1<sup>st</sup>, thus locking/grandfathering us in to the pre-March 1<sup>st</sup> incentives.**



# Resources, support, and next steps

- > Next PC&IP meeting on **Thursday, February 10<sup>th</sup>, 2021** (8:30 AM-10 AM)
  - Proposals for discussion at the next Working Group must be received by **February 1<sup>st</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>)

# Thank you!

