

# **NYS Clean Heat Working Group Series**

for Participating Contractors & Industry Partners

Session #1

May 13, 2021, 8:30 am–10 am

**NYS Clean Heat  
Joint Management Committee**



**NYS Clean Heat**

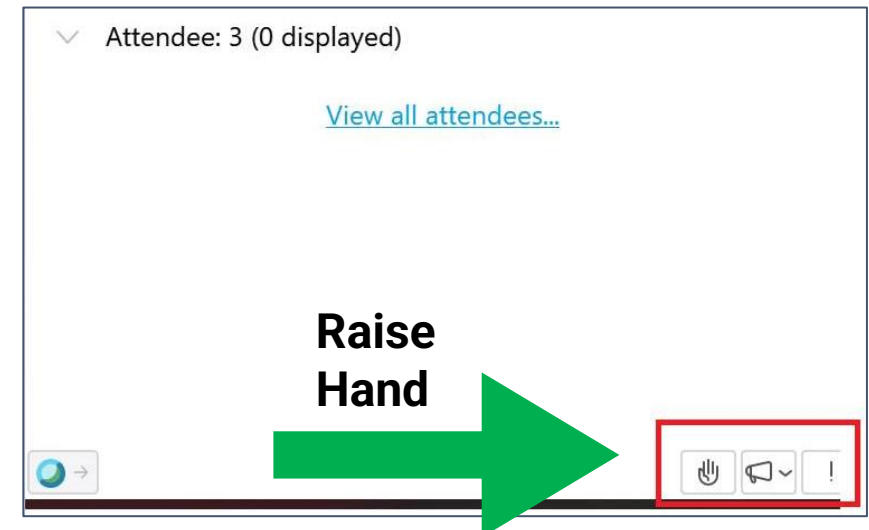
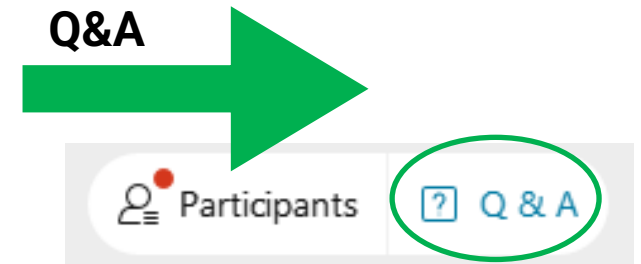
# Agenda

- > Meeting procedures (**2m**)
- > Welcome & safety message (**3m**)
- > NYS Clean Heat Working Group Series overview (**20m**)
- > Discussion of key issues to date (**60m**)
- > 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](mailto:pdauderis@ceadvisors.com)



# Welcome and safety message

## 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**: RISE Engineering

## > Our Working Group support team:

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

# Working Group Series

## *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

## *Typical meeting format*

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

# Working Group Series

## *Stakeholder input template (1 of 3)*

> Speaker and stakeholder(s) represented:

**John Ciovacco, NY-GEO**

> Issue and context:

ENERGYSTAR Tier 3 certification requirement for GSHP is too stringent

> Market barrier to adoption

– *X projects that currently do not meet this requirement out of Y total*

> Balance maintaining efficiency standards with administrative burden

– *\$Z cost to meet this requirement*

> Proposed change / solution requested:

Request revision from “certified by” to “meets or exceeds standards of”

# Working Group Series

## *Stakeholder input template (2 of 3)*

> Suggested priority level (High, Medium, or Low) with explanation:

Medium – market clarity required, but guidance is sufficient in the interim before an official change

> Requested timing for change / solution:

Request inclusion in the next Program Manual revision

> Who else this issue affects:

Participating Contractors currently installing GSHP equipment that are not ENERGYSTAR Tier 3-certified



# Working Group Series

## *Stakeholder input template (3 of 3)*

- > **One** slide of relevant detail
- > E.g.
  - Highlight of technical specification
  - Summary of analysis
  - Summary of cost-benefit

# Discussion of key issues to date

## > Provide updates to stakeholder feedback received recently

1. **Participating Contractors** – enhancements to the application process

2. **Participating Contractors** – improvements on onboarding and management

3. **Category 4: Custom projects** – updates on resources, requirements, and process

4. **Eligibility requirements** – updates

5. **GSHP Quality Assurance (QA/QC) inspection checklist** – updates

6. *Other topics that cannot comprehensively be addressed by the JMC*

> Several changes discussed will be reflected in the revised Manual (July 2021 revision)

> **For future meetings, stakeholders will present on topics as the basis for discussion**

# 1) Participating Contractors – enhancements to the application process

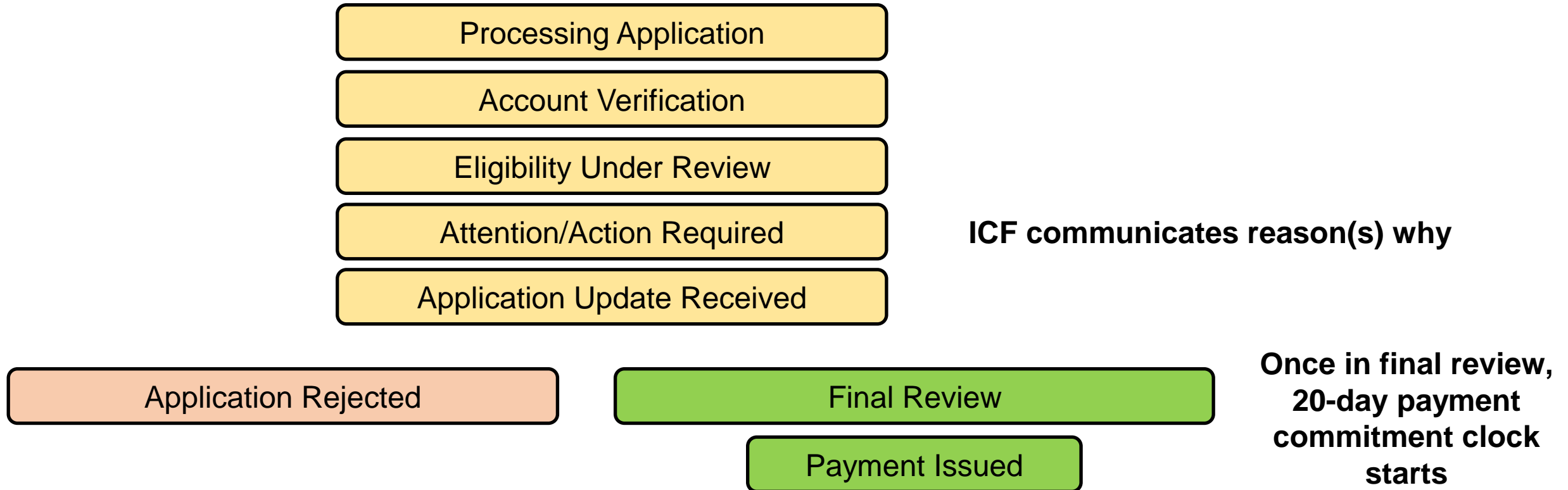
- > **Single statewide application design complete**
  - For Categories 1-3
  - Now finalizing National Grid’s online tool (mid-June)



*Log-in page for NYSEG/RG&E (other utilities have similar interfaces).*

# 1) Participating Contractors – enhancements to the application process

- > OIT will show key application status levels, with emails generated to provide more information



# 1) Participating Contractors – enhancements to the application process

- > **Single statewide hotline and email** (mid-June)
  - For all contractors across all territories
  - Project-specific inquiries
- > **Dashboard for tracking project aging** (late June)
  - Measure performance against the program goal of 20-day turnaround from approved application
- > **Minimize required forms to streamline contractor process**
  - Customer Acknowledgement form to be filled out early in the process (e.g. contract signing) to avoid additional visits (May)

## 2) Participating Contractors – improvements on onboarding and management

- > **Contractor Participation Application Portal** (July)
  - One statewide online application portal
  - Links to relevant forms, portal for uploading additional documents
  - Harmonized onboarding and program training process
- > **Participating Contractor Management System** (mid-August)
  - **To coordinate:**
  - Clean Heat “Find-A-Contractor” tool
  - Utility website contractor listings
  - Participating Contractor Statuses

### 3) Category 4: Custom projects – updates on resources, requirements, and process

Update	Description
<b>Tools for calculating savings and incentives</b>	Excel sheets to calculate MMBtu savings and \$ incentives (7/1) <ul style="list-style-type: none"><li>• Can be used for upfront estimating as well as submitting completed applications</li></ul>
<b>Application process and participation requirements</b>	Provide clarifications in the PM update (7/1) <ul style="list-style-type: none"><li>• Please refer to the Con Edison C&amp;I guide in the interim (will be shared)</li></ul>

## 4) Eligibility requirements – updates

- > In response to various stakeholder comments and recommendations
- > To be made official in the Program Manual update on **July 1<sup>st</sup>**



## 4) Eligibility requirements – updates

Incentive Category	Before	After
<b>1) ccASHP: Partial load heating</b>	Minisplits	Minisplits, Central ccASHP systems
<b>3) GSHP: Full load heating</b>	ENERGYSTAR certification required	Meet or exceed ENERGYSTAR specifications
<b>9) Bonus for Space + Water Heating</b>	Category 2 (ccASHP) + Category 5 (HPWH)	Category 2/3 (AS/GSHP) + Category 5/8 (HPWH/WWHP)
<b>Con Edison Category 4 and 6</b>	\$150/MMBtu and \$80/MMBtu, respectively	Both \$150/MMBtu

## 4) Eligibility requirements – updates

Document	Before	After
<b>Participating Contractor application form</b>	No category for ASHP designer	ASHP Designer added
<b>Customer Acknowledgement Form</b>	<ul style="list-style-type: none"><li>• Incentive payable only to Contractor</li><li>• Customer attestation post-install</li></ul>	<ul style="list-style-type: none"><li>• Incentive may be re-assigned to a 3<sup>rd</sup> Party</li><li>• Customer attestation at onset of project</li></ul>

## 5) GSHP Quality Assurance (QA/QC) inspection checklist – updates

- > Incorporates feedback from the geothermal community
- > Copy shared with NY-GEO
- > Revised checklist will be in effect starting on July 1<sup>st</sup>

## 6) Other topics that cannot comprehensively be addressed by the JMC

Topic	Suggested forum
<b>Marketing coordination with the HeatSmart Communities</b>	Directly with the applicable HeatSmart Community
<b>Savings baseline</b> <ul style="list-style-type: none"><li>• Code vs existing conditions for retrofits</li></ul>	Performance Management & Improvement Process (PM&IP)
<b>Utility rate design</b>	PM&IP
<b>Code</b> <ul style="list-style-type: none"><li>• Emissions code</li><li>• Code issues around gas</li></ul>	PM&IP
<b>Demand response collaboration</b>	Directly with the applicable utility
<b>Refrigerant concerns</b>	PM&IP

# Resources, support, and next steps

- > Next Meeting on **Thursday, June 10, 2021** (8:30 AM-10 AM)
- > NYS Clean Heat Website - (<https://saveenergy.ny.gov/NYScleanheat/resources/>)
- > Participating Contractor newsletters

# 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
- > **Email inbox** – [NYSCleanHeat@ceadvisors.com](mailto:NYSCleanHeat@ceadvisors.com) – for *program*-related inquiries
  - Proposals for discussion at the next Working Group must be received 10 days prior to meeting, i.e., by 5 pm Monday the week before (**Monday, May 31**)
- > Email inbox and hotline for *project*-related inquiries (*to come*)

Thank you!