

# Residential Contractor Monthly Check-In

May 7, 2021

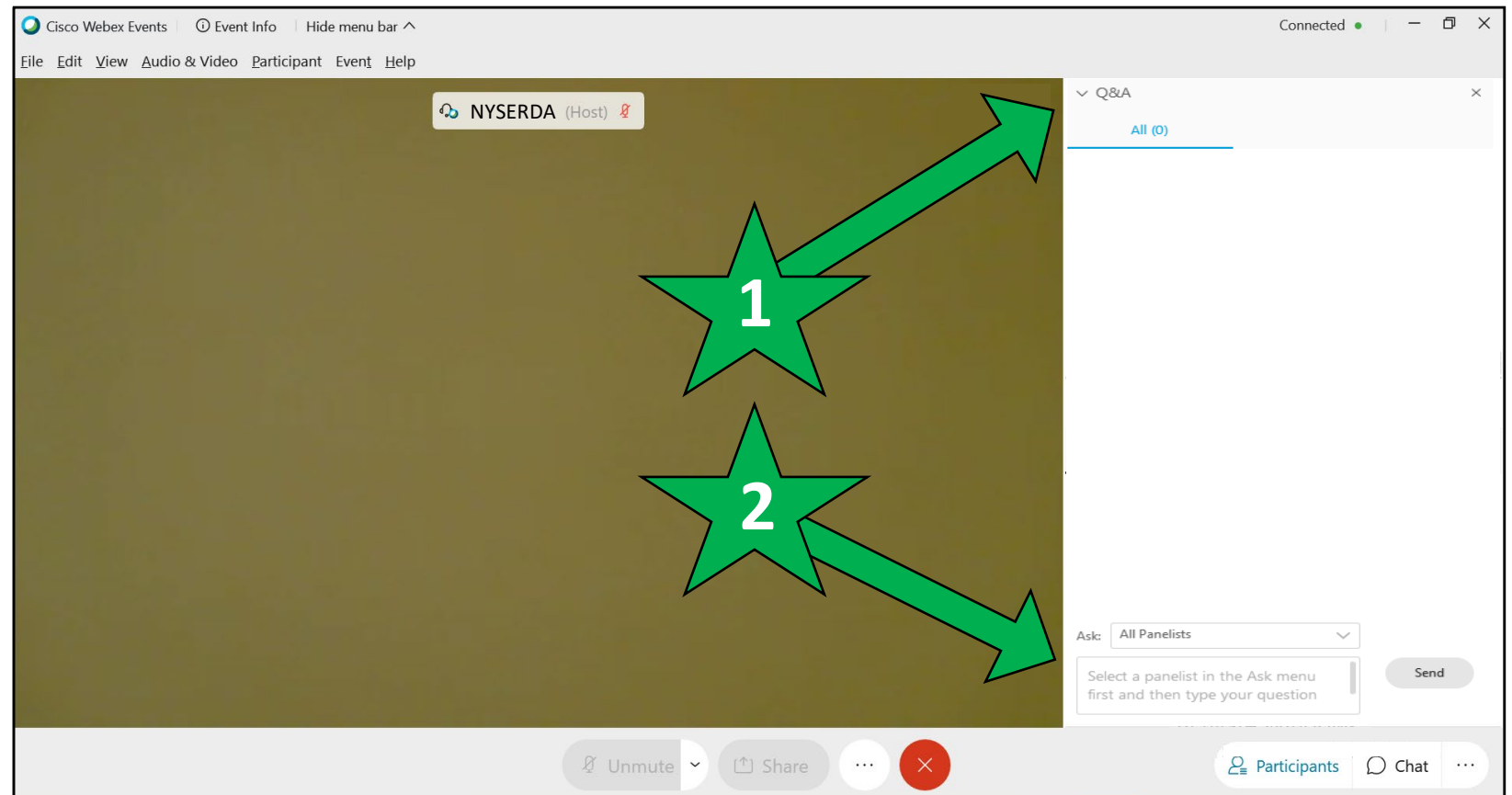


# Q&A - Using Text

1. Locate the Q&A function in the upper right portion of your webinar panel.

Click on the small arrow to the left of “Q&A” to expand the text field.

2. Type your question into the text field and click “send.”



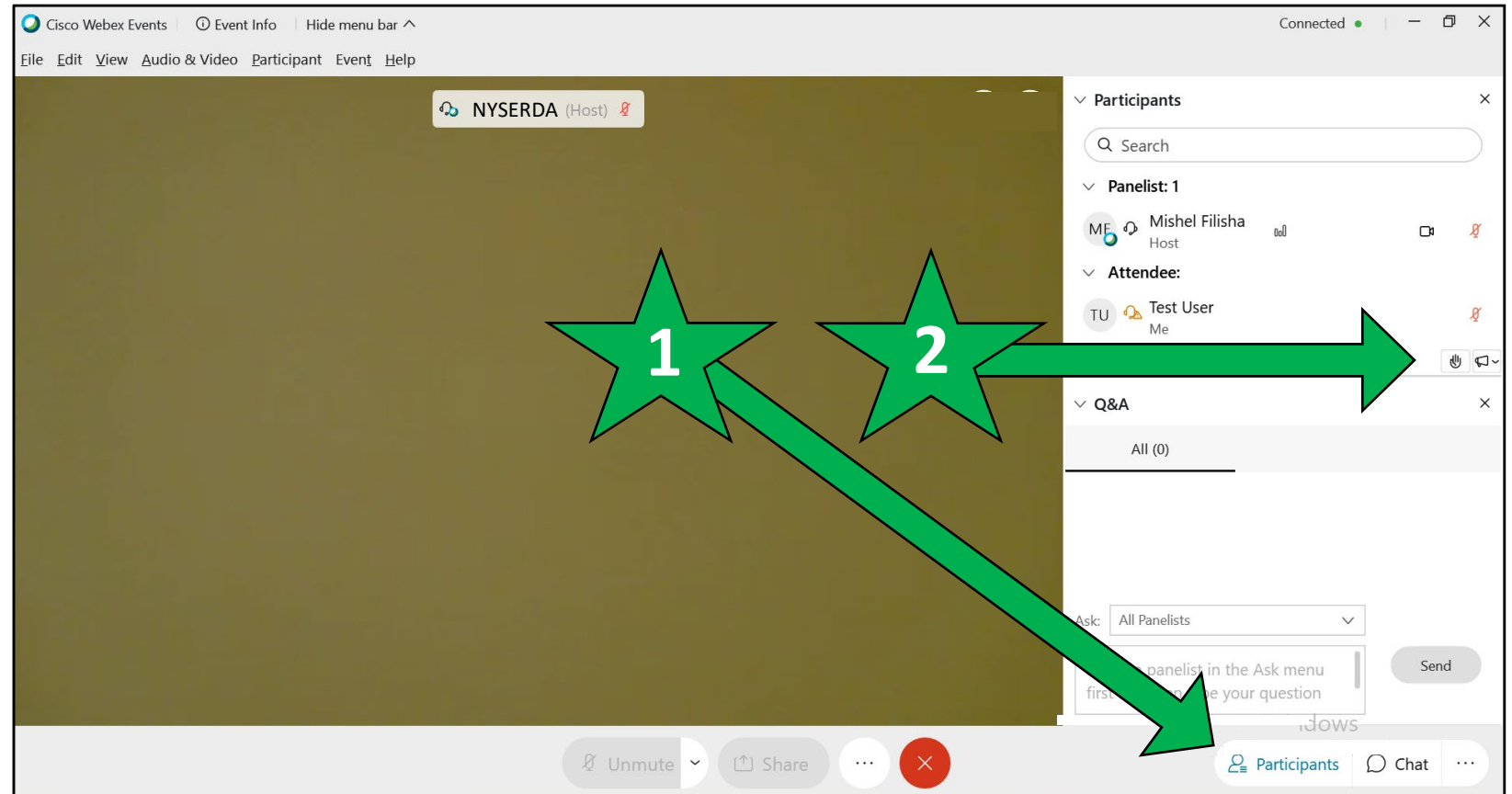
# Q&A - Using “Raise Hand” and Microphone/Phone

1. Open your participant panel using the oval icon near the bottom of your screen.
2. Locate the “raise hand” icon just below and to the right of your name in the participant panel.

Click on the raise hand icon to let us know you have a question.

When the Tech Assistant indicates you are unmuted, you can ask your question verbally through your computer mic or phone.

When you are finished talking, please click on the hand icon again to indicate you are no longer raising your hand.



# Agenda

- **NYSERDA Heat Pump Planner**
- **NYSERDA Cooperative Marketing**
- **Participation Agreement Updates**
- **BPI Field Supervisor certificate**
- **Partial Payments**



**NYSERDA**

# **NYSERDA Heat Pump Planner**

**Michael Courtney**  
**Project Manager**  
**Single Family Residential Program**

**May 6, 2021**

**Residential Contractors & Interested Organizations Webinar**



**NYSERDA**

# NYS Clean Heat

## Statewide Consumer Awareness and Education Marketing Campaign

**Collaborative between NYSERDA and all six investor-owned utilities**

**To build consumer demand and consideration for and market confidence in heat pumps and complementary energy efficiency measures.**

**To increase the awareness and installation of electric heating and cooling equipment throughout the State of New York.**

**To reduce customer acquisition costs for installations of heat pumps to be on parity with traditional HVAC installations.**

**Campaign launched on April 19**

**Statewide**

- Internet-based TV (all screen sizes)
- Digital Banners and Video/YouTube
- Streaming Radio
- Native Advertising/Sponsored Content
- Email
- Social Media
- Paid Search

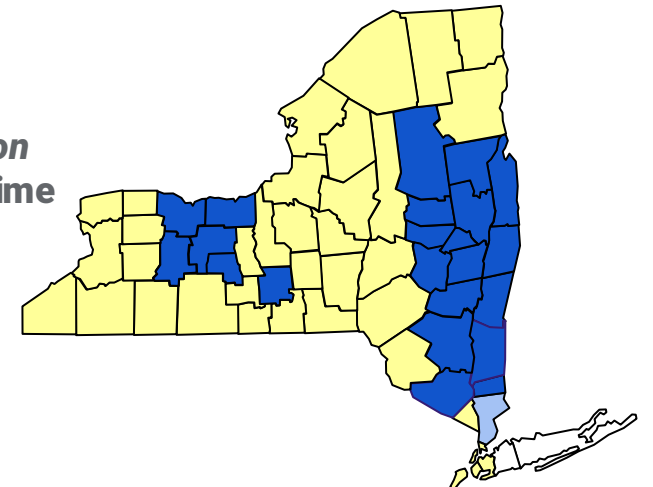
**Specific Geographies**

***Rochester, Tompkins County, Capital Region/Mid-Hudson***

- Cable TV – AM News, Prime Time, Weekend Daytime
- Terrestrial Radio – :30 second spots

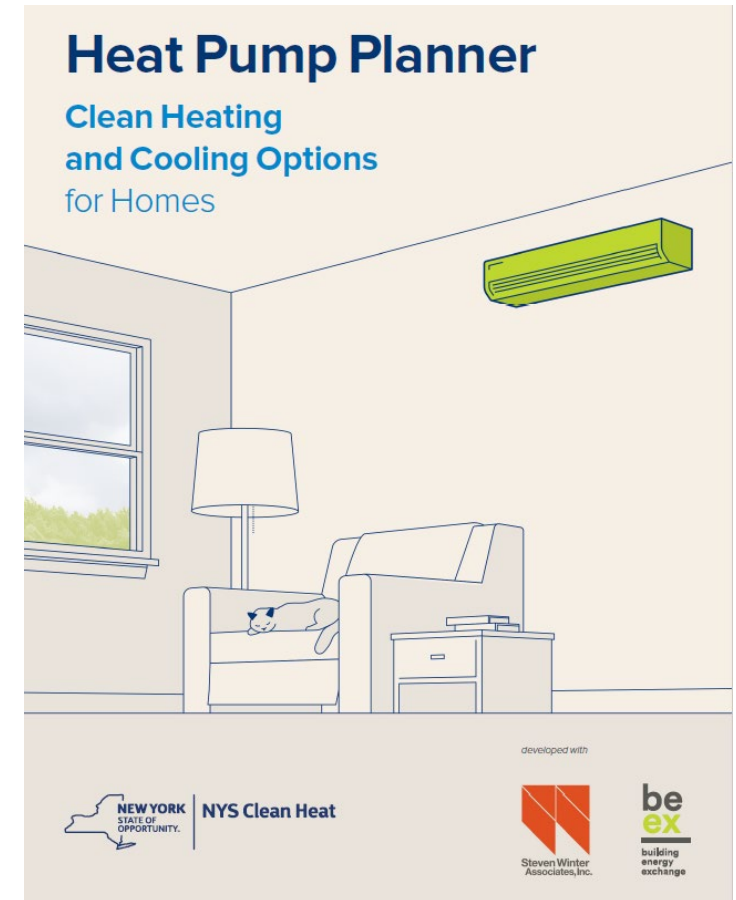
**Albany Market**

- Local News/Broadcast TV



# What is the Heat Pump Planner?

- > **Meant for consumer who is evaluating alternatives**
  - Knows about heat pumps and wants to know about option details before buying – think of it like “test driving” different car models
- > **Pdf and website version (under development) for heat pump customers:**
  - Educate customers on basics of residential heat pump options
  - Can reduce education time during sales visits
  - Guide to benefits of basic heat pump options fit to home types
  - Give homeowners a picture of what it would look like
  - Explain benefits of heat pumps
  - Give a sense of what decisions affect cost, no estimates



# How was the Planner Developed?

- **Consumer Interviews**
- **Contractor Interviews**
- **Subject Matter Experts**





# Planned Formats

## > PDF Print Version – completed

- **Contractors**
  - Hard copy/online to review at sales visits, home shows/events, pre-visit mailings
  - Leave-behind handout
- **Customers on NYSERDA Website**
- **Outreach Programs – CEEP, HeatSmart, etc.**

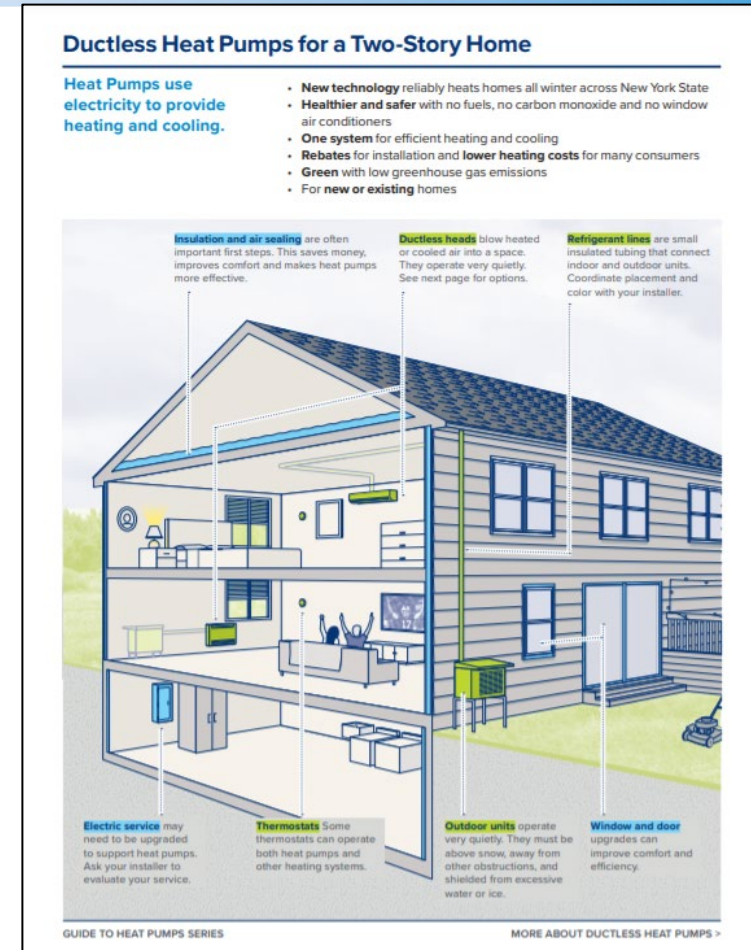
## > Web Version

- **More creative, interactive version**
- **Plan basic site by Mid-year 2021**
- **Based on pdf content & illustrations, more photos, roll-overs**

# Pattern Book Content

- > Consumers guided to 12 “plans” based on “choose your own adventure” format based on selecting:
- Housing Type
  - Existing distribution system (existing ducts or not)
  - (Web version) or, by an FAQ –
    - e.g., “How can I heat an addition?”
    - “I’m thinking of getting air conditioning...”

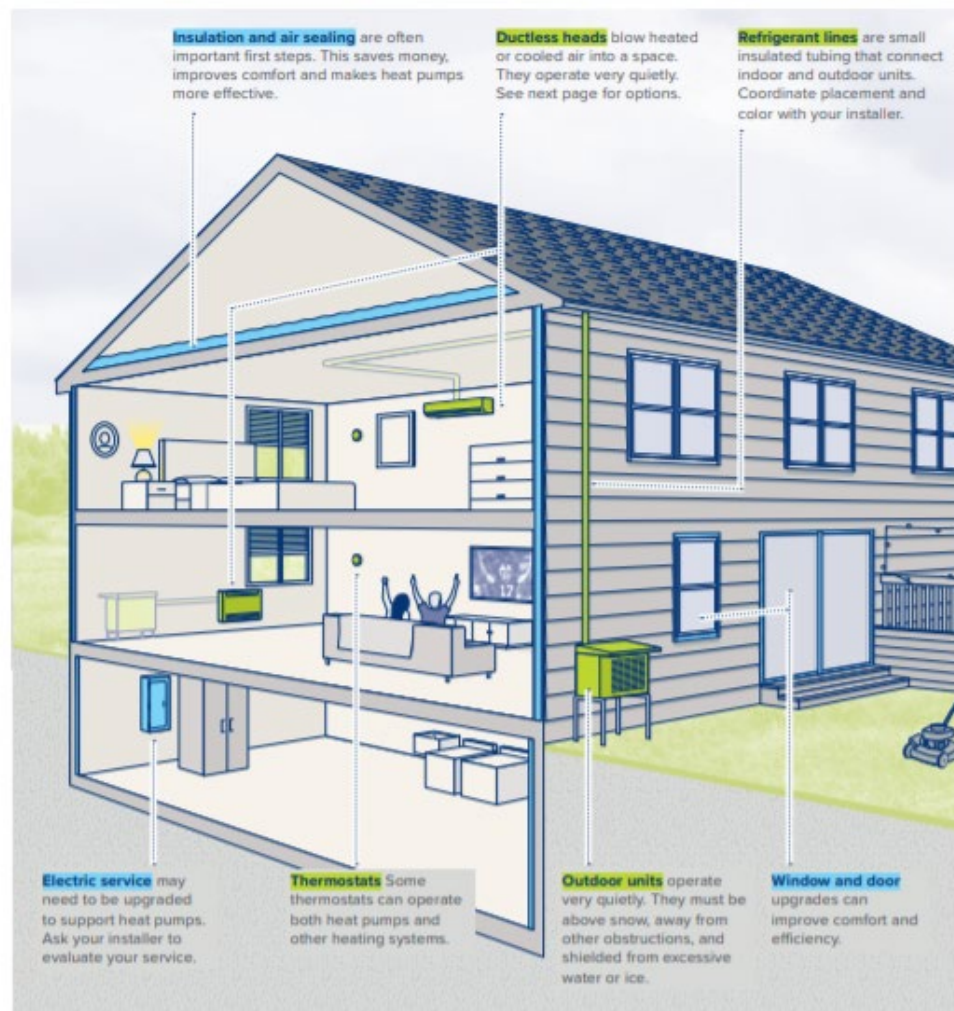
Each “Plan” is a stand-alone two-page (front/back)



## Ductless Heat Pumps for a Two-Story Home

Heat Pumps use electricity to provide heating and cooling.

- **New technology** reliably heats homes all winter across New York State
- **Healthier and safer** with no fuels, no carbon monoxide and no window air conditioners
- **One system** for efficient heating and cooling
- **Rebates** for installation and **lower heating costs** for many consumers
- **Green** with low greenhouse gas emissions
- For **new or existing** homes



## Ductless Heat Pumps

## key considerations

### Features

- Among simplest and least expensive to install for new or existing homes
- Control temperature in individual spaces
- Quiet and efficient operation
- Eliminate noisy and cumbersome window air conditioners
- Typical lifespan of 15 years

### Types of Ductless Heads

Many options for indoor fan coils or "heads" are available. For optimal comfort and efficiency, each head should be sized to meet specific heating and cooling needs. Your heat pump installer can suggest the best options based on those needs plus size and configuration of the space.



### Ask Your Installer

- What size units do I need? **Ask for room-by-room heating and cooling calculations.**
- Can heat pumps provide all of my heat or do I need backup?
- What is the best location for each head? Can we avoid heads directly above where people sit or sleep?
- What are my options for locating each outdoor unit?
- How long will installation take? Where and when will you need access?
- How do I operate my system for the best comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSDERDA or your electric company for incentives and financing options. Increased incentives may be available for eligible customers
- Ductless heat pumps are among the simplest and least expensive to install
- Cost varies with region, heat pump size, manufacturer, installation complexity, and installer experience

#### Operating Cost

- Your overall heating costs will likely decrease if switching from oil, propane or electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise. Your fuel bills will drop or disappear
- As New York moves away from fossil fuels, electric heat pumps are expected to provide additional savings

SPACE FOR CONTRACTOR INFO






# NYSERDA Heat Pump Planner Webpage


## [NYSERDA.ny.gov/HeatPumpPlanner](https://www.nyserdanyc.org/HeatPumpPlanner)

**NYSERDA**

Business & IndustryCommunities & GovernmentsResidents & HomeownersPartners & InvestorsResearchers & Policymakers

 **SUBSCRIBE**  
Pick a topic, get updates!

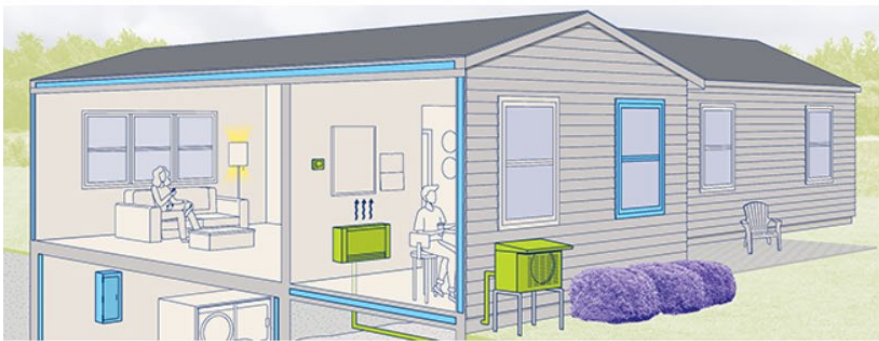
Find A ProgramFind a ContractorAboutContact



Heat Pump Program

**Heat Pump Planner**

## Heat Pump Planner



Need help determining the heat pump system that might be best for your home? Our Heat Pump Planner tool will help you learn more about heat pump technology, the types available, installation and operation costs, and questions to ask an installer.

You can download the full [Heat Pump Planner \[PDF\]](#) for more information about heat pumps and using the Planner, or discover the heat pump technology that might be the best for you by using the chart below.

- See the [introduction page \[PDF\]](#) for descriptions of the different types of heat pumps

### Discover Heat Pump Options for Your Home

# Discover Heat Pump Options for Your Home

Answer the questions below and then use the chart to review some of the options that may be the best fit for your home.

**What kind of home do you have?** There are a variety of systems available that work in several types of homes.

**Do you have forced-air heating?** If your home currently has ducts for heating or cooling, these can often be reused for ducted heat pump systems. **No ducts? No problem.** There are many ductless options for heat pumps. Additionally, multi-zone systems can combine a variety of ducted or ductless indoor heating/cooling distribution systems from a single outdoor heat pump unit.

Home Type	Existing Ductwork	Ductless
Two Story	<a href="#">Ducted Air Source</a> [PDF]	<a href="#">Ductless Air Source</a> [PDF]
	<a href="#">Ground Source (Geothermal)</a> [PDF]	<a href="#">Multi-zone Air Source</a> [PDF]
	<a href="#">Multi-zone Air Source</a> [PDF]	
Single Story	<a href="#">Ducted Air Source</a> [PDF]	<a href="#">Ductless Air Source</a> [PDF]
	<a href="#">Ground Source (Geothermal)</a> [PDF]	<a href="#">Multi-zone Air Source</a> [PDF]
Manufactured	<a href="#">Ducted Air Source</a> [PDF]	<a href="#">Ductless Air Source</a> [PDF]
Townhome		<a href="#">Multi-zone Air Source</a> [PDF]
Flat (Within Townhome)		<a href="#">Ductless Air Source</a> [PDF]

If you don't see an example you are looking for on the chart, try looking at a similar house type. For example, there is no townhome example with existing ductwork, but you could look at a two-story home with ductwork to see that option. You may want to review other home types to see different heat pump options and always work with an installation contractor to design the best system for your home.

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## Introduction to Heat Pumps

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### One-Story Home

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Ductless Heat Pump for a One-Story Home



Ducted Heat Pump for a One-Story Home



Multi-zone Heat Pump for a One-Story Home



Ground Source Heat Pump for a One-Story Home



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### Two-Story Home

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Ductless Heat Pumps for a Two-Story Home



Ducted Heat Pumps for a Two-Story Home



Multi-zone Heat Pump for a Two-Story Home



Ground Source Heat Pump for a Two-Story Home



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### Manufactured or Mobile Home

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Ductless Heat Pump for a Manufactured or Mobile Home



Ducted Heat Pump for a Manufactured or Mobile Home



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### Apartment

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Ductless Heat Pump in an Apartment



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### Townhome

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Multi-zone Heat Pump for a Townhome



**NYSERDA**

## Why Heat Pumps?

Heat pumps are **safer** and more **efficient**, **sustainable**, and **versatile**. Why?

- Heat pumps cost less to operate than oil, propane, or electric baseboard heating systems.
- Heat pumps are a safer option compared to gas or liquid fuels. There is no chimney, gas line, oil tank, or burning of fuels and no risk of generating carbon monoxide.
- Heat pumps can provide all your heating and cooling needs. The same unit cools your house in the summer and provides heat in the winter.
- Heat pumps generate no greenhouse gas emissions when your electricity comes from clean sources. Heat pumps can also be powered by solar at your home.
- With current technology, heat pumps are efficient in all seasons and can provide most (if not ALL) of the heating needs in homes across New York State.

### Consider Heat Pumps When:

- You want to save money compared to an oil, propane, or electric baseboard heating system
- You want to add air conditioning or replace an existing AC unit
- Your heating system is old and will soon need replacement
- You are planning a major renovation or building a new home
- You want to address comfort problems in certain areas of your home
- You need to provide heating and cooling to an addition
- You want to improve health and safety for your family
- You want to reduce your carbon footprint



**NYSERDA**



# Using the Heat Pump Planner



## What kind of home do you have?

The guide shows a variety of systems in several types of homes.

## Do you have forced-air heating?

If your home currently has ducts for heating or cooling, these can often be reused for ducted heat pump systems.

## No ducts? No problem.

There are many ductless options for heat pumps.

**Whole home solution?** Heat pumps can efficiently heat and cool entire homes all across the state, but they can also be installed in additions or spaces with comfort problems.

## Know the right questions to ask.

Each system includes key questions for your heat pump installer. Work with installers to review options for your home type, price point, and other goals.

**Insulate the home.** Adding insulation and sealing air leaks will improve comfort, lower heating and cooling bills, and reduce the size (and cost) of the heat pumps needed. See resources for making your home more efficient at [www.nyserda.ny.gov/Residents-and-Homeowners/Seal-and-Insulate-Your-Home](http://www.nyserda.ny.gov/Residents-and-Homeowners/Seal-and-Insulate-Your-Home).

**Understand costs, financing, and incentives.** Heating with heat pumps is less costly than with oil, propane, or electric baseboards. Check with NYSEDA or your electric company for incentives and financing options.



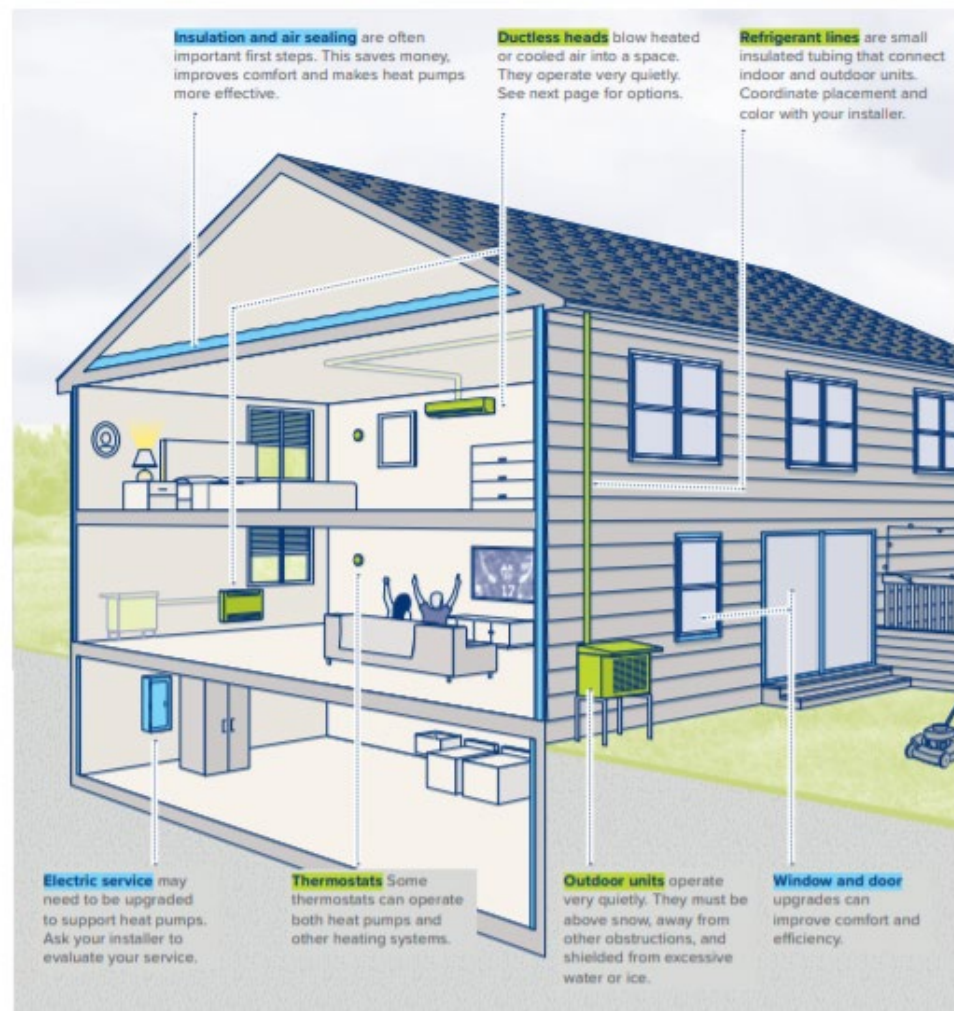
**NYS Clean Heat**



## Ductless Heat Pumps for a Two-Story Home

Heat Pumps use electricity to provide heating and cooling.

- **New technology** reliably heats homes all winter across New York State
- **Healthier and safer** with no fuels, no carbon monoxide and no window air conditioners
- **One system** for efficient heating and cooling
- **Rebates** for installation and **lower heating costs** for many consumers
- **Green** with low greenhouse gas emissions
- For **new or existing** homes



## Ductless Heat Pumps

## key considerations

### Features

- Among simplest and least expensive heat pump system to install
- Control temperature in different areas of the home
- Quiet and efficient operation
- Eliminate window air conditioners

### Types of Ductless Heads

Many options for indoor fan coils or "heads" are available. For optimal comfort and efficiency, each head should be sized to meet specific heating and cooling needs. Your heat pump installer can suggest the best options based on those needs plus size and configuration of the space.



- 1 Low-wall or floor mount** units may be installed where radiators once were. Do not block them with furniture.
- 2 High-wall** are the most common and versatile.
- 3 Recessed** can be flush with ceilings or walls. Ask your installer about installation and maintenance.

### Ask Your Installer

- What size units do I need? **Ask for room-by-room heating and cooling calculations.**
- Can heat pumps sufficiently heat my home or is an additional system needed?
- What is the best location for each head? Can we avoid heads directly above where people sit or sleep?
- What are my options for locating each outdoor unit?
- How long will installation take? Where and when will you need access?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSEDA, your electric company, and installer for incentives and financing options as larger incentives may be available for eligible customers
- Ductless heat pumps are among the simplest and least expensive to install
- Cost varies with region, heat pump size, manufacturer, installation complexity, and installer experience

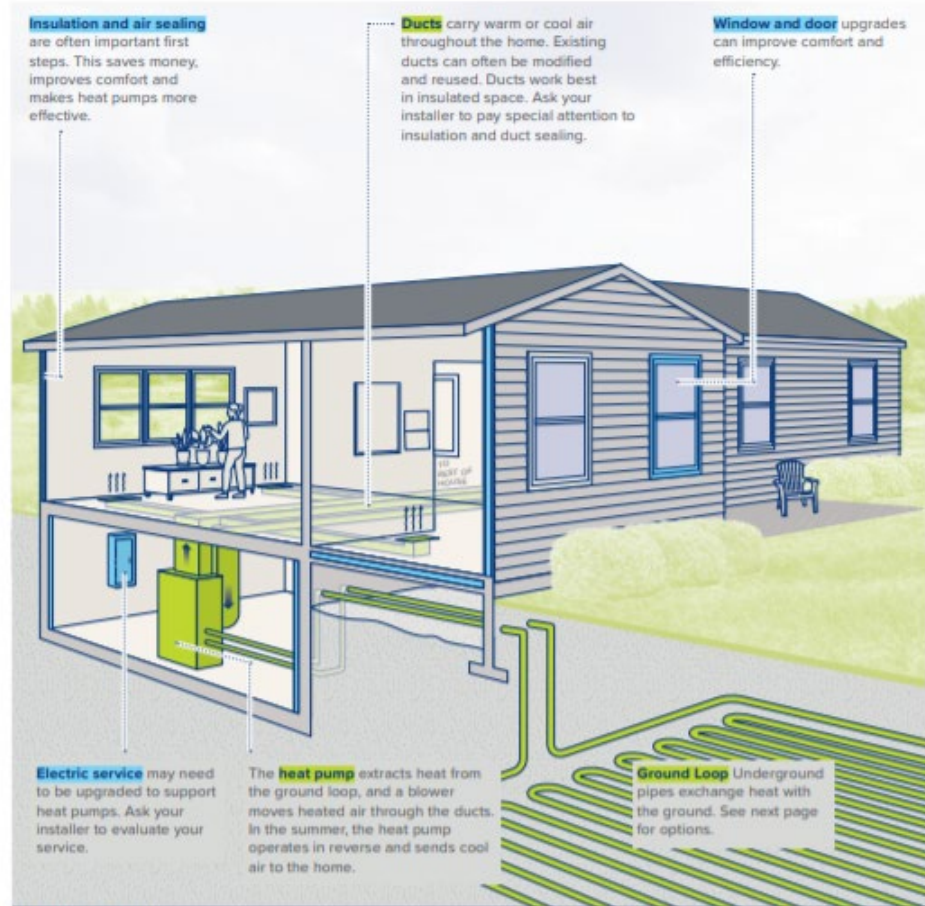
#### Operating Cost

- Your overall heating costs will likely decrease if switching from oil, propane, electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise; however, gas, oil, or propane bills will drop or disappear
- Efficient homes (windows, doors, insulation, air sealing) have much lower operating costs

## Ground Source Heat Pump for a One-Story Home

Heat Pumps use electricity to provide heating and cooling.

- Ground source or "Geothermal" systems can heat homes all winter across New York State
- **Healthier and safer** with no fuels, no carbon monoxide and no window air conditioners
- **One system** for efficient heating and cooling
- **Rebates** for installation and **lower heating costs** for many consumers
- **Green** with low greenhouse gas emissions
- For **new or existing** homes



HEAT PUMP PLANNER

MORE ABOUT GROUND SOURCE HEAT PUMPS >

## Ground Source Heat Pumps

key considerations

### Features

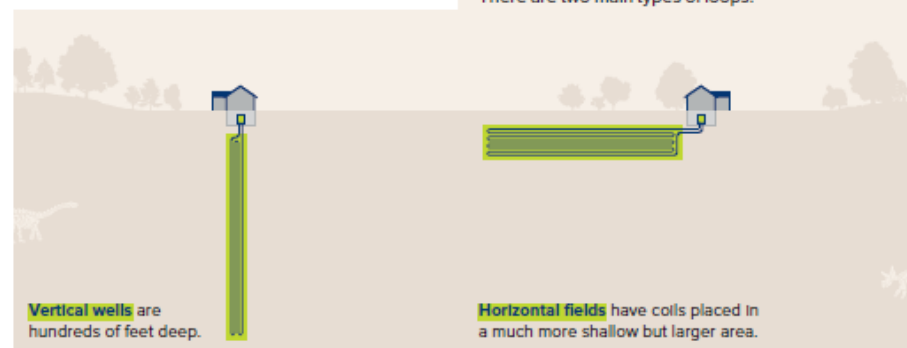
- Highest efficiency with lowest operating costs
- Quiet with no outdoor condensers or window air conditioners
- Heating and cooling distributed throughout the home with new or existing ducts
- Can also provide water heating

### Ground Loop Types

Underground pipes exchange heat between the heat pump and the ground. Your installer will determine the proper type and size of ground loop based on:

- Land area available
- Type of rock or soil
- Heating and cooling needs of the home

There are two main types of loops.



**Vertical wells** are hundreds of feet deep.

**Horizontal fields** have coils placed in a much more shallow but larger area.

### Ask Your Installer

- Will proper heating and cooling get to each space? Ask for room-by-room heating and cooling calculations.
- Are my ducts big enough for a heat pump? What modifications are needed?
- How long will installation take? Where and when will you need access?
- Who is responsible for landscaping after the ground loop is installed?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSERDA, your electric company, and installer for incentives and financing options as larger incentives may be available for eligible customers
- While ground source heat pumps are the most efficient, they are also more expensive to install
- Cost varies with region, installation complexity, installer experience, system size, and manufacturer

#### Operating Cost

- Your overall heating costs will likely decrease if switching from oil, propane, or electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise; however, gas, oil, or propane bills will drop or disappear
- Efficient homes (windows, doors, insulation, air sealing) have much lower operating costs



NYS Clean Heat

This document is part of NYSERDA's Heat Pump Planner.

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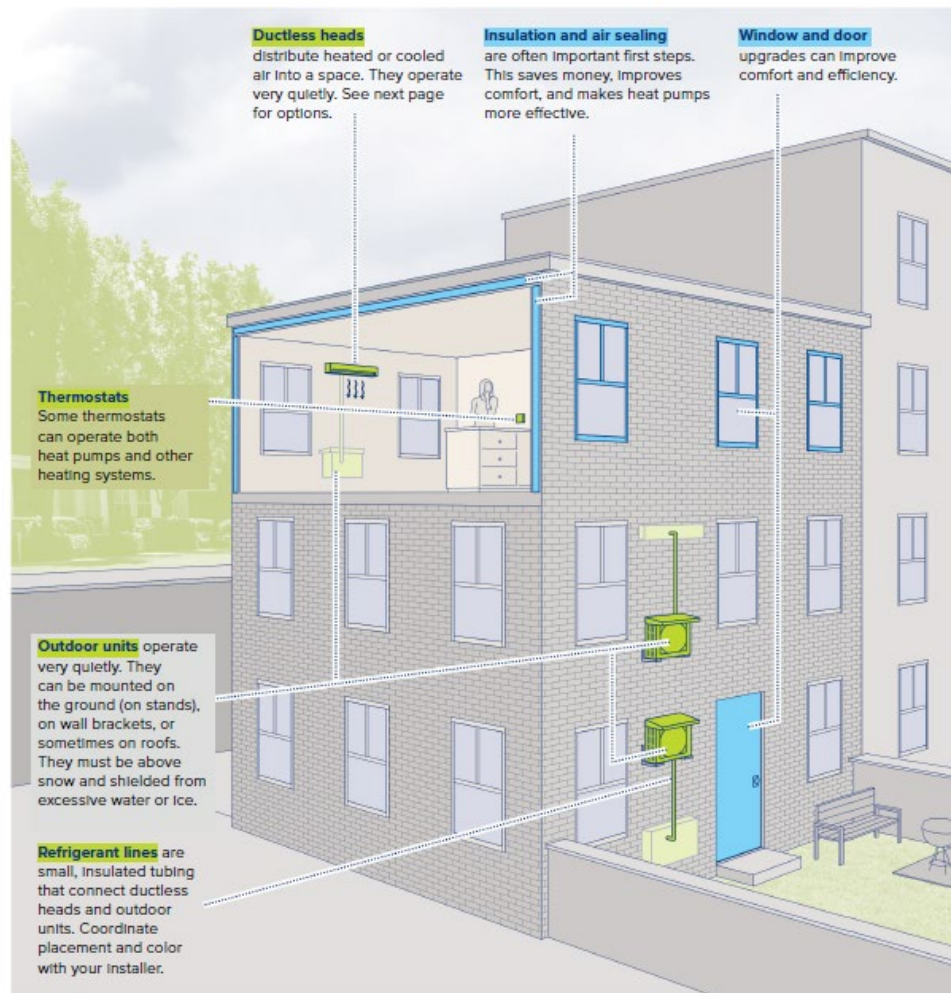
Learn more at: [nyserdanyc.org/HeatPumpPlanner](https://nyserdanyc.org/HeatPumpPlanner)



## Ductless Heat Pump for an Apartment

Heat pumps use electricity to provide clean, efficient heating and cooling.

- **Proven technology** heats and cools homes year-round across New York State
- **One system** provides comfort in both summer and winter
- **Healthy and safe** with no fuels, carbon monoxide, or window air conditioners
- **Affordable** with rebates, financing options, and low operating costs
- **Clean and green** with reduced greenhouse gas emissions
- **Versatile** solution for new or existing homes



## Ductless Heat Pumps

## key considerations

### Features

- Among simplest and least expensive heat pump system to install
- Control temperature in different areas of the home
- Quiet and efficient operation
- Eliminate window air conditioners

### Types of Ductless Heads

Many options for indoor fan coils or "heads" are available. For optimal comfort and efficiency, each head should be sized to meet specific heating and cooling needs. Your heat pump installer can suggest the best options based on those needs plus size and configuration of the space.



### Ask Your Installer

- What size units do I need? **Ask for room-by-room heating and cooling calculations.**
- Can heat pumps sufficiently heat my home or is an additional system needed?
- What is the best location for each head? Can we avoid heads directly above where people sit or sleep?
- What are my options for locating each outdoor unit?
- How long will installation take? Where and when will you need access?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSEDA, your electric company, and installer for incentives and financing options as larger incentives may be available for eligible customers
- Ductless heat pumps are among the simplest and least expensive to install
- Cost varies with region, heat pump size, manufacturer, installation complexity, and installer experience

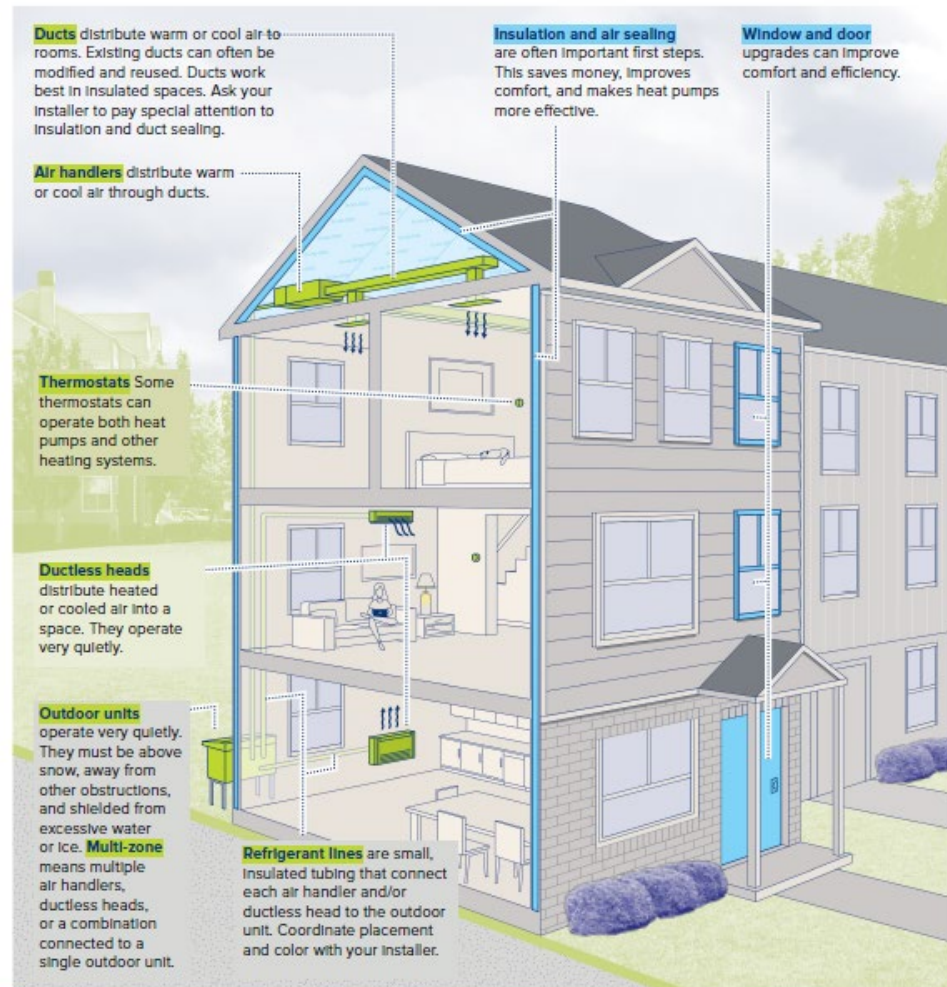
#### Operating Cost

- Your overall heating costs will likely decrease if switching from oil, propane, electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise; however, gas, oil, or propane bills will drop or disappear
- Efficient homes (windows, doors, insulation, air sealing) have much lower operating costs

## Multi-Zone Heat Pump for a Townhome

Heat pumps use electricity to provide clean, efficient heating and cooling.

- **Proven technology** heats and cools homes year-round across New York State
- **One system** provides comfort in both summer and winter
- **Healthy and safe** with no fuels, carbon monoxide, or window air conditioners
- **Affordable** with rebates, financing options, and low operating costs
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- **Versatile** solution for new or existing homes



## Ductless Heat Pumps

## key considerations

### Features

- Among simplest and least expensive heat pump system to install
- Control temperature in different areas of the home
- Quiet and efficient operation
- Eliminate window air conditioners

### Types of Ductless Heads

Many options for indoor fan coils or "heads" are available. For optimal comfort and efficiency, each head should be sized to meet specific heating and cooling needs. Your heat pump installer can suggest the best options based on those needs plus size and configuration of the space.



- 1 Low-wall** or **floor mount** units may be installed where radiators once were. Do not block them with furniture.
- 2 High-wall** are the most common and versatile.
- 3 Recessed** can be flush with ceilings or walls. Ask your installer about installation and maintenance.

### Ask Your Installer

- What size units do I need? **Ask for room-by-room heating and cooling calculations.**
- Can heat pumps sufficiently heat my home or is an additional system needed?
- What is the best location for each head? Can we avoid heads directly above where people sit or sleep?
- What are my options for locating each outdoor unit?
- How long will installation take? Where and when will you need access?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSEDA, your electric company, and installer for incentives and financing options as larger incentives may be available for eligible customers
- Ductless heat pumps are among the simplest and least expensive to install
- Cost varies with region, heat pump size, manufacturer, installation complexity, and installer experience

#### Operating Cost

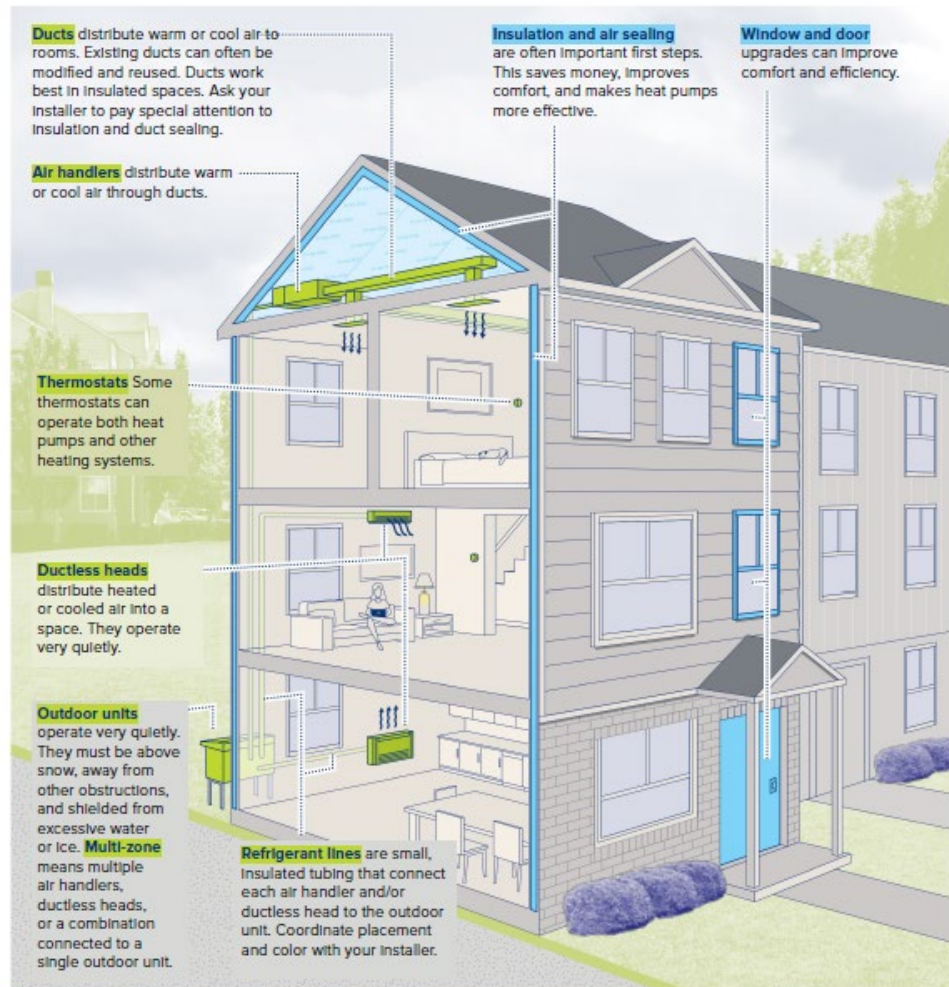
- Your overall heating costs will likely decrease if switching from oil, propane, electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise; however, gas, oil, or propane bills will drop or disappear
- Efficient homes (windows, doors, insulation, air sealing) have much lower operating costs



## Multi-Zone Heat Pump for a Townhome

Heat pumps use electricity to provide clean, efficient heating and cooling.

- **Proven technology** heats and cools homes year-round across New York State
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- **Clean and green** with reduced greenhouse gas emissions
- **Versatile** solution for new or existing homes



Zoom out (Ctrl+Minus)

## Multi-Zone Air Source Heat Pumps

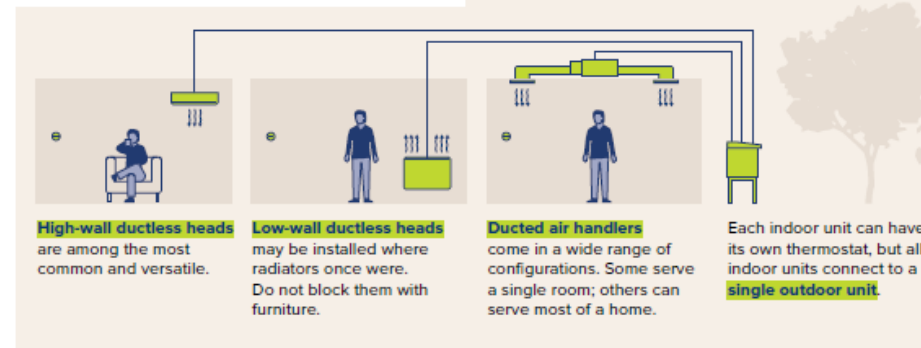
key considerations

### Features

- Save space outdoors with multiple indoor units connected to one outdoor unit
- Control temperature in different areas of the home
- Options for both ducted and ductless heating and cooling
- Quiet and efficient operation
- Eliminate window air conditioners

### Types of Indoor Units

Multi-zone heat pumps allow you to "mix and match" ducted air handlers and ductless "heads." Each should be sized to meet specific heating and cooling needs of the space it serves. Your installer can suggest the best options based on those needs, configuration of the home, and location of ducts (if present). Options include:



### Ask Your Installer

- What size units do I need? **Ask for room-by-room heating and cooling calculations.**
- Can heat pumps sufficiently heat my home or is an additional system needed?
- What is the best location for each indoor unit? Can we avoid heads directly above where people sit or sleep?
- What are my options for locating the outdoor unit(s)?
- How long will installation take? Where and when will you need access?
- How do I operate my system for optimal comfort and efficiency?
- What maintenance is required? How often should I clean or change air filters? Is annual service needed?
- What is the expected lifespan and warranty?

### Cost Considerations

#### Installation Cost

- Check with NYSERDA, your electric company, and installer for incentives and financing options as larger incentives may be available for eligible customers
- Each zone adds cost, so use fewer zones when practical
- Cost varies with region, heat pump size, manufacturer, installation complexity, and installer experience

#### Operating Cost

- Your overall heating costs will likely decrease if switching from oil, propane, or electric baseboard
- If you previously heated with fuel, don't be surprised to see electric bills rise; however, oil, or propane bills will drop or disappear
- Efficient homes (windows, doors, insulation, air sealing) have much lower operating costs



# Questions?



**Michael Courtney**

**[michael.courtney@nyserda.ny.gov](mailto:michael.courtney@nyserda.ny.gov)**

**(518) 862-1090 x3139**

# NYSERDA Cooperative Advertising



**NYS Clean Heat**

# What is the Cooperative Advertising and Training Program?

Cost-sharing incentives to support advertising, special promotions, events, or training for eligible clean energy technologies:

- > **cold-climate air source heat pumps**
- > **ground source heat pumps**
- > **energy efficiency (i.e. air sealing and insulation)**
- > **high-efficiency low-emission wood heating systems**



# Incentive Rules - Overview

- > **Annual Cap:** Contractors/Installers may apply for up to \$100,000 within 2021, activities do not necessarily need to be completed within 2021 (activities must be completed within 12 months of the application date)
  - > Example: Apply on 6/1/21 – activities completed by 6/15/22
- > **Marketing support services are eligible** for co-op. The total dollars spent toward services cannot exceed 25 percent of the total request. Services may include:
  - Creative Development
  - Production Costs
  - Google Analytics, Tag Manager, or Dashboards
  - Paid Media Campaign Set-up, Support, and Targeting

# Co-op Advertising

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## *Requirements*

**NYSERDA's program and marketing teams review all applications to evaluate cost-effectiveness, lead generation potential, reach/impact, messaging, and overall quality of the design and content.**

**Installers/Contractors must include and abide by the following:**

**Technology:** focused on clean heating and cooling technologies eligible through the NYS Clean Heat program or energy efficiency measures

**Geography:** funded activities must occur within the SBC service territory

**Messaging:** at least one technology benefit information message (energy savings, cost savings, healthy/safety, environmental, comfort, convenience, etc.)

# Co-op Advertising

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## *Reporting*

To continue funding the program past 2022, NYSERDA must demonstrate success through rigorous tracking and data collection.

- > Participants will be required to **provide the number of leads** the advertising generated, and **the number of projects** as a result of those leads.
  - Initial information will be collected in the payment request form and again at three months post-marketing run dates.
- > **Automating the lead tracking process** can make the reporting requirement much easier.
  - Call volume tracking
  - Email tracking
  - Google Analytics and Tag Manager setup
  - Custom dashboards

**Reminder: marketing support services can be covered (up to 25 percent of the total co-op request)**

# Where Do I Find This Program Information?

**Program Opportunity Notice (PON) 4482**

**Cooperative Advertising and Training for Clean Energy Partners**

[https://portal.nyserda.ny.gov/CORE\\_Solicitation\\_Detail\\_Page?SolicitationId=a0rt0000011YFNMAA4](https://portal.nyserda.ny.gov/CORE_Solicitation_Detail_Page?SolicitationId=a0rt0000011YFNMAA4)

**Program Manual:**

[https://portal.nyserda.ny.gov/CORE\\_Solicitation\\_Document\\_Page?documentId=a0lt0000000sBXuAAM](https://portal.nyserda.ny.gov/CORE_Solicitation_Document_Page?documentId=a0lt0000000sBXuAAM)

**Apply Online:**

<https://nyserda.seamlessdocs.com/f/CHCCOOP>

**Payment Request Form (online submission):**

[https://nyserda.seamlessdocs.com/f/coop\\_payment](https://nyserda.seamlessdocs.com/f/coop_payment)

**To Verify NYS Clean Heat Participation Status:**

<https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/NYS-Clean-Heat-Contractors>

# Participation Agreement Updates

# Participation Agreement Updated Sections

The April 1, 2021, Program Announcement modified several sections of the AHP/EmPower Participation Agreement

- **2.01(b) 3 and 4: Contractor Participation Levels**
- **2.02: Certified Staff**
- **2.12: Financing & Incentives**
- **The revised Participation Agreement can be found in Section 2.3 of the Contractor Resource Manual. All updates were live as of April 1, 2021**
- **Link available [here](#)**

# Contractor Participation Levels

- **Heat pump water heaters have been removed from 2.01 (b) (3) and added along with electric hot water heaters to Section 2.01 (b) 4**
- **Heat pump Water/Electric Water Heaters”**
  - BPI AC/Heat Pump or
  - Manufacturer training or
  - Company is licensed plumber and/or electrician in the locality where the work will be performed or
  - Approved installer in the NYS Clean Heat program

# Certified Staff

- **Participating contractors are permitted to utilize a sub-contractor with the necessary credentials for measure installs**
  - Example: an insulation contractor without the credentials to do heating work could hire a subcontractor with the necessary credentials to install a heating system
- **Section 2.02 is updated per the below:**
  - “Measures installed through the Program must be installed by a Participating Contractor who possesses the proper credentials or by using a sub-contractor who maintains the necessary credentials as defined in Section 2.01. The Participating Contractor shall ensure that work performed in the Program adheres to the technical standards established and maintained by the credentialing organization, for each certification and meet the Program requirements outlined in the Contractor Resource Manual”



# Financing & Incentives

- **Section 2.12 Under Financing and Incentives**

- Revision allows for one measure to receive multiple incentives

- **The revised language is as follows:**

- “The Participating Contractor shall ensure that the Program Financing options and incentives are utilized only for the installation of those eligible measures and accessories identified in the work scope submitted to, and satisfactorily approved by, the Program. Program participants can receive an incentive on a measure that is also receiving a utility incentive or an incentive through another NYSERDA program; however, the combined value of incentives cannot exceed value of the total cost of the measure. For any measure receiving an incentive from a utility or other outside funding, contractors must inform the Program of the incentive source and amount. Application of fair and reasonable pricing is also required per Section 8.07 of this Agreement for any measures installed through the Program. “

# BPI Field Supervisor certificate

## **Webinar on Supervisor certificate May 13<sup>th</sup> at 4PM**

- Look for an email on Monday with Webinar information
- Webinar will walk through process to access and take the training and exam

## **Tentative launch of training and exam week of May 17<sup>th</sup>**

- All participating contractors will receive two free training/exam codes via email
- Codes will have an expiration date

# Partial Payments

# Partial Payment Overview

- > **In consideration of the ongoing supply constraints and increased cost of materials, the EmPower and Assisted Home Performance Programs have provided an option for participating contractors to receive a partial payout for projects that cannot proceed at this time.**
- > **Prior to requesting a partial payment, Program encourages contractors to review the scope of work proposed and make their best effort to provide alternate solutions so projects may move forward to completion. This will be the quickest and most comprehensive path to full payment.**
- > **Partial payment can only be used once (1) per project and the total invoiced project amount must meet or exceed \$2,000, and should only be used if the workscope is unable to be revised. All submitted measures for payment must be 100% completed to receive payment.**

# Partial Payments: Two Options Available

- > **Option One**: Revise Workscope so that all work can be completed with available materials. This is the quickest and most comprehensive path to full payment.
- > **Option Two**: Partial Payment for completely installed measures where the project total meets or exceeds \$2,000. Project closed and audit incentive withheld pending completion of remaining workscope. Project reopened upon request.

# Partial Payments: Project Conditions

- > **Certain conditions must be met for a project to be eligible for partial payments.**
  - **Each measure submitted for partial payment must be 100% completed.**
  - **Project total of invoiced measures must meet or exceed \$2,000.**
  - **Signed CoC submission attests that the home was left in a safe condition.**
  - **Contractor commits to returning to the home at the earliest opportunity available to complete the required work.**
  - **Program considers a project partially completed if at least one measure (including Audit/Electric Reduction measures) has been completed.**
- > **Contractors should contact their Account Manager with any questions on this process.**

# Option 2: EmPower Process

- > **At Final Project Submission, Contractors will submit their EmPCalc and final documentation.**
  - Only measures that have been 100% completed can be submitted. Billing for partially installed measures will not be accepted.
  - The total cost of the invoiced measures must meet or exceed \$2,000.
  - Submission of final test out documentation verifying the home was left in a safe and healthy condition is required.
- > **Program will review submission, and all provided documentation following the typical process.**
- > **If approved for payment, Program will withhold the audit fee.**
  - The audit fee will be paid once the Contractor returns to the customers' home and complete the remaining work and resubmits.
- > **All projects with partially completed workscopes will be sent to Technical Review for final review and confirmation that the project is approved for payment.**
- > **Invoiced completed measures will then be paid on the next invoice.**
- > **When ready to return to the customer's home, please request the project be reopened by calling Contractor Support or emailing [support.residential@nyserda.ny.gov](mailto:support.residential@nyserda.ny.gov).**

# Option 2: Assisted Home Performance Process

Partially completed projects can be submitted for consideration of payment of the loan OR subsidy.

- > Partial payment for projects with loans can only occur if the contractor participates in the [GJGNY Residential Loan Fund Residential Advance Payment Program](#). This program allows a contractor to get 50% of the loan when the loan documents are signed and the remaining 50% when the project is complete.
- > Completion must occur within 180 days of the advance, or the contractor must submit a request for extension to NYSERDA.
- > For projects without loans, the applicable subsidy for the completed measure will be paid and the contractor incentive will be withheld.
- > After the partial loan or subsidy payment the project will be returned to the contractor for re-submission when the project is fully completed.



# Option 2: Assisted Home Performance Process

Submit at Final Project Documents in NY HP Portal

- > **Signed contract, Customer Information Form, Eligibility Summary Report (noting in Section 5 the work that had not been completed)**
- > **Post Installation Health & Safety Test Results**
  - **Add the following HP Portal Project note: Work/Audit delayed due to Supply Chain issues.**
- > **In that note provide a detailed list of what measures remain to be installed. Including the Test Out.**
- > **Payment for the partial work will be made and the project rolled back to the appropriate stage so that the remaining document/work can be completed.**
  - **The rollback note will include partial amount paid, date of completion, what is needed for remaining project balance to be processed and paid.**
  - **No partially completed measures can be paid. For example, no payment can be made for completing ½ of the side walls.**

# Thank you

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