

Single Family Residential Program Update

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EmPower +

December 1, 2023

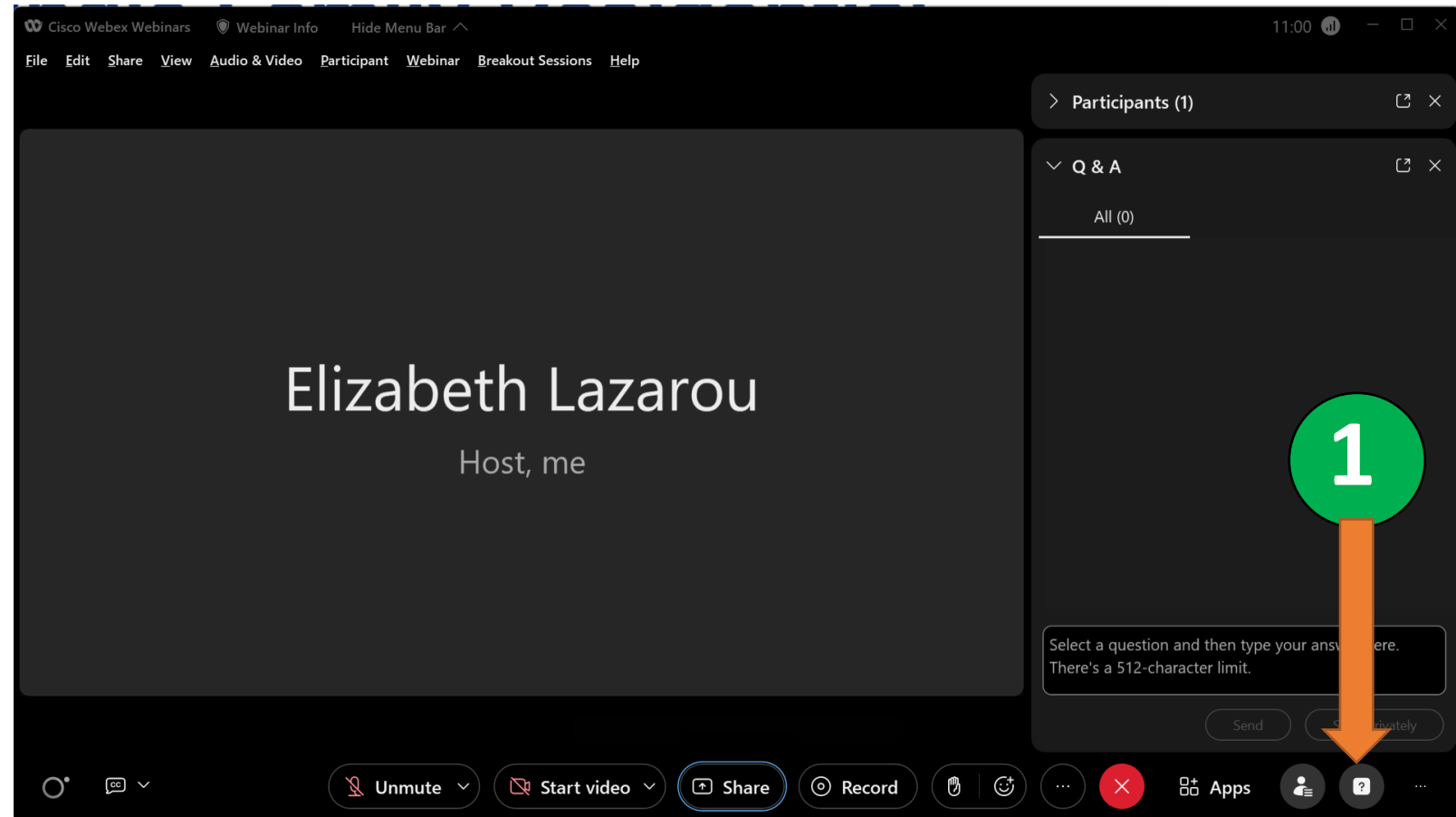


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Options for Q&A During Today's Webinar - Text

OPTION 1 - TEXT

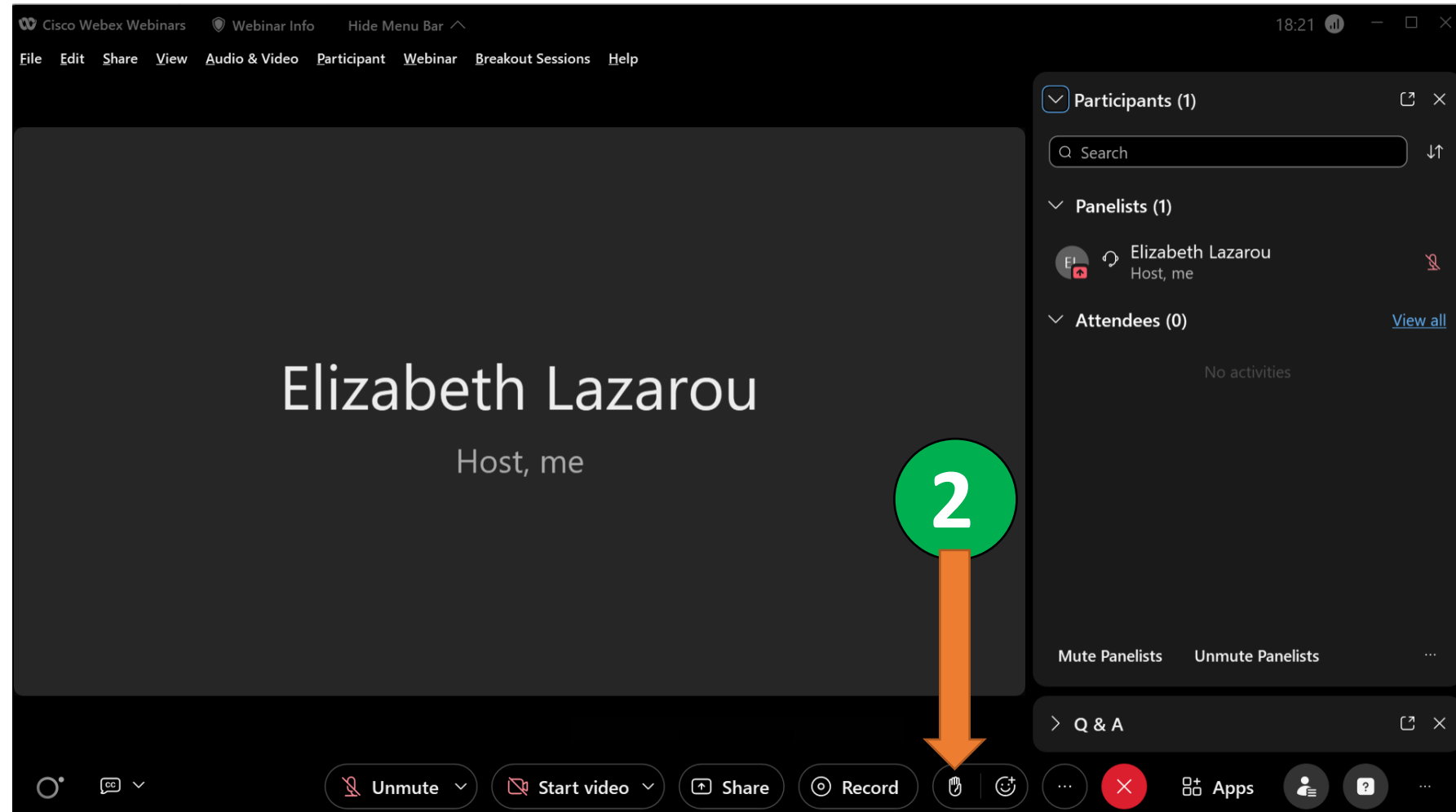
- Locate the Q&A function by clicking on the question mark box in the lower right portion of your webinar panel.
- Type your question into the text field and click "send."
- The host will read the question to the group and discuss with the team to best answer.



Options for Q&A During Today's Webinar - Mic/Phone

OPTION 2 - MIC/PHONE

- Locate the “raise hand” icon in the toolbar on the bottom of your screen.
- Click on the raise hand icon to let us know you have a question.
- The Host will indicate when you have been sent a request to unmute, click on the unmute request then ask your question verbally through your computer mic or phone



Agenda

1. Income Limits
2. HERR Update
3. Marketing Material Reminder
4. Project Acceptance Timeline
5. Field Change Order Process/Assessment Installation Form
6. Shared Services and Tech Services Contracts
7. Moderate Income Heat Pump Study
8. OTDA Funding Update
9. Holiday Hours



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Income Limits



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Updated Income Limits

- The income limits for EmPower+ have been updated and are effective as of November 1, 2023.
- These income limits are based on 2023-2024 State Median Income numbers provided by the Home Energy Assistance Program (HEAP) and 2023 Area Median Income numbers provided by The Department of Housing and Urban Development (HUD).
- The updated guidelines can be found in Section 3.4 of the [Program Manual](#) and on the [EmPower+ webpage](#).
- All websites and program materials have been updated to reflect these changes. If you have any questions about these changes, please contact your Account Manager.

HERR Update



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OTDA HERR Benefits Increased

- Effective October 2, 2023, the Office of Temporary and Disability Assistance (OTDA) has increased the benefit available through the [Heating Equipment Repair or Replacement](#) (HERR) Benefit to \$4,000 for a repair and \$8,000 for a replacement.
- The HERR Benefit provides incentives for eligible low-income homeowners to repair or replace failed direct heating equipment. In addition, the maximum resource limit for HERR was increased to \$10,000.
- Low-Income households looking to participate in HERR, can call a [Local District Contact](#). If it is determined the low-income household is not eligible for the HERR Benefit or if the HERR Benefit will not cover the entire cost of the system, the household may be eligible for incentives through EmPower+.
 - Please refer to the [No Heat Guidelines](#) Section 5.9 of the Program Manual for additional information.

Marketing Material Reminder



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Marketing Material Reminder

- Following the launch of EmPower+ in July, NYSERDA requested Participating Contractors review their literature and websites and change all references of EmPower NY and Assisted Home Performance with ENERGY STAR® to EmPower+ by September 1, 2023.
- When discussing program offerings with customers, please refer to the Program as EmPower+, this helps create program awareness and helps eliminate confusion.
- Any marketing or media review requests with references to “EmPower” and not “EmPower+” will be denied.
- Please ensure any references to EmPower or Assisted Home Performance in your own literature or on company websites have been updated to EmPower+.

Project Acceptance Timeline



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Project Acceptance Timeline

- In September, the EmPower+ program announced an extension to the time contractors have to accept customers in the NYHEP portal to 15 calendar days with one 5 business day extension.
- Effective **January 1, 2024**, this process will revert back to the original timeline.
 - Contractor has 5 business days to accept the Enrollment and can request a one-time, 5-business day extension.
- It is imperative for Contractors to routinely check their customer assignment queues.
 - If you know you cannot serve a household, decline the assignment in a timely manner so the customer can be assigned to another Contractor.
 - This helps maintain a positive customer experience.
- Please contact your Account Manager with any questions

Project Acceptance Timeline

Early 2024, NYSERDA is working on an enhancement to NYHEP that will semi-automate assignments to improve turnaround times.

When this automation is active, the timeline will be updated as follows

- Initial Contractor Assignment- Contractor has 5 business days to accept the Enrollment and can request a one-time, 5 business day extension.
- Second Contractor Assignment- If the initial Contractor does not accept the Enrollment within the initial 5 day w/5 day extension period or rejects it, the Enrollment will be auto-assigned to a second Contractor who will have 5 business days to accept the Enrollment. No extensions will be granted to the second contractor.
- Third Contractor Assignment- If the second Contractor does not accept the Enrollment within 5 business days, the Enrollment will get auto-assigned to a third Contractor who will have 5 business days to accept the Enrollment. No extensions will be granted to the third contractor.
- Final Contractor Assignment - If the third Contractor fails to accept the Enrollment, it will get sent to a manual assignment queue where the implementor will work with a Contractor to get the customer accepted.

Field Change Order Process



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Field Change Order Process

Effective January 1, 2024, the following process requirements will be in place for Field Change Orders and the Assessment Installation Form.

Field Change Orders

- For projects where the approved workscope is different than the final workscope, regardless of the dollar amount, a [Field Change Order](#) must be completed and signed by the household as affirmation they have been informed of the modification to the project.
- In instances where the changes are greater than \$500, the Participating Contractor must receive approval from the Program. This can be a call to the account manager or through the contractor support line if the account manager is unavailable.

Assessment Installation Form

- For all projects, the Assessment Installation Form must be reviewed and signed by the household. Preferably, this should occur at the time of the assessment; however, it can be signed at a later stage providing a signed copy is uploaded as part of the final project submission.
- Currently, NYSERDA is working with the BPCA and Participating Contractors to review and streamline existing Program forms. NYSERDA expects this effort to be completed in early 2024 and will provide updates to the forms and requirements once available.

Shared Services and Tech Services Contracts



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Shared Services and Tech Services

Effective January 1, 2024, the NYSERDA Single Family Residential Program Implementation services will be transitioned to two entities providing programmatic and customer support as outlined below.

Customer Engagement and Enrollment Contractor

- TRC will assume the responsibility of customer interactions prior to approving the customer for enrollment in a Single-Family Residential program.
- Specifically, TRC will:
 - Process customer applications for EmPower+
 - Provide income verification services for program incentives
 - Process low-income referral files and mailings or other outreach to referred customers
 - Provide call-center support for new customers to answer questions and assist with customer enrollment

TRC will continue to provide technical support for the Comfort Home program through 2024.

Shared Services and Tech Services

Program Operations and Technical Support Contractor

The selected organization will assume the responsibility of customer support once an application has been approved and programmatic and technical support for participating contractors in the EmPower+ and Residential Energy Assessment programs.

- Specifically, the selected organization will
 - Provide NYSERDA administrative support maintaining program participation agreements, updating program processes and other resources
 - Provide technical and programmatic support to contractors through trainings, in-field and remote assistance, manage support tickets and call center
 - Provide customer support for in-progress work and post-completion inquiries or other issues
 - Process manual workscope and final project reviews, including incentive invoice processing

NYSERDA is finalizing contracting with the selected organization and will announce the award as soon as the contract is completed.

Moderate Income Heat Pump Study



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December Updates: Moderate-Income ASHP Incentive Pilot Study

Trevor Dean Arnold
ModASHP@nyserda.ny.gov

Purpose of Study

Reach NY's decarbonization goals

Provide equitable access to electrification

Encourage adoption of new projects

Find the optimum incentive to maximize heat pump adoption among moderate income residents

=> Provide incentives in the future

=> Provide other ways of increasing demand, such as through marketing, advertising, support, and other ways of increasing customer demand for ASHP

Details of Study

This incentive is offered with EmPower+ Moderate Incentive (prev. Assisted Home Performance), thus follows the AHP guidelines on ASHP installations. Other grants, incentives, and funding are stackable.

Time	June 21, 2023 – March 31, 2024
Eligible Contractors	EmPower+ Moderate Income Participating Contractors
Eligible Counties	All counties where an EmPower+ Moderate Income projects can be completed
Income Tier	Moderate-Income (Tier 3)
Number of projects	~45 (\$250,000 budget, \$180,000 remaining)
Fuel type	All
System type	Air Source
Heating Load	Full/Whole House/90-120%
Incentive amount	\$4,000 or \$6,000 (randomized at time of application)

Process of Study

* Prior to applying for EmPower+ Moderate Incentive *

1. Contractor schedules or completes an energy audit
2. Customer + Contractor completes the web application form
3. NYSERDA randomizes customer into \$4k or \$6k group *automated*
4. Both customer and contractor are notified via email of incentive amount *immediately*
5. Based on results, contractor deducts incentive off the installation price of the ASHP for the customer
6. Customer + Contractor submit scope of work + income eligibility applications
7. Pilot Study Budget is lowered for incentive amount after project is Committed (every week)
8. Project is completed and contractor is paid (currently on a weekly schedule for new invoices)

Walk throughs of Resources

Resources:

> Contractor support website:

<https://hpwescontractorsupport.com/moderate-income-heat-pump-incentive-study/>

Switch to example of the webform:

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

OTDA Funding Update



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OTDA funding FY 2023

Complete Projects and Funding	1,841	\$14,416,680
In Progress Projects with submitted Workscope and Funding	796	\$5,943,657
In Progress Projects w/o submitted Workscope and Funding	4,703	\$36,311,971

Total of Completed and In-Progress with Workscope: \$20,360,337

OTDA23 Total Budget: \$ 24,871,874.00

OTDA23 Remaining Unspent Budget: \$10,455,193

Approximate weekly spend is \$800,000

Holiday Impacts on EmPower+ Program

Closures

- Monday, December 25: NYSERDA & CLEAResult
- Tuesday, December 26: CLEAResult
- Monday, January 1: NYSERDA & CLEAResult

Emergency project approval contacts will be shared via a Program Announcement later in the month.

Invoices

CLEAResult will submit two invoices to NYSERDA the week of the 24th with payments expected to be dispersed within 2-3 days.

- Wednesday, December 27 → estimated payment by Jan 2
- Thursday, December 28 → estimated payment by Jan 3



Questions?



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