



NYSERDA Residential Market Advisory Group (RMAG) Quarterly Meeting

Webinar: June 28, 2023

Meeting Summary

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RMAG Meeting Q2 2023

Meeting Summary

Wednesday, June 28 at 1:30pm ET

Background

On June 28, 2023, the New York State Energy Research and Development Authority (NYSERDA) hosted a virtual meeting of the Residential Market Advisory Group (RMAG). NYSEDA Single Family Residential staff and external panelists gave presentations on the topic of “Improving Market Awareness and Urgency for Residential Clean Energy and Energy Efficiency.”

In total, 67 individuals attended the meeting, including 11 NYSEDA staff.

Meeting Agenda

- *Welcome, Agenda Review, and Introductions*
- *RMAG Priority Survey Review*
- *Inflation Reduction Act Next Steps*
- *BPI Total Building Performance Certificate*
- *NYSERDA Comfort Home Program*
- *NYSERDA Experience Clean Heat Program*
- *Wrap Up and Next Steps*

Welcome, Agenda Review, and Introductions

Trevor Reddick, facilitator for the meeting from Kearns & West, opened the webinar. He introduced Laura Geel, Assistant Director of Single Family Residential at NYSEDA, and asked Laura to welcome attendees.

Laura thanked attendees for their participation, explaining that the topic for the meeting, “Improving Market Awareness and Urgency for Residential Clean Energy and Energy Efficiency,” was identified as a priority topic by RMAG membership in a survey after the Q1 Quarterly Meeting.

Trevor briefly reviewed the meeting agenda and housekeeping items for the call. He ended the introductory segment with an explanation of the RMAG’s role as a forum for NYSEDA Single Family Residential stakeholder engagement. The group’s process diagram, reflecting its structure and activities, is attached here as [Appendix A](#).

RMAG Priority Survey Review

Laura reviewed outcomes of a Q1 RMAG Quarterly Meeting priority survey, which asked attendees to name the topics they thought were the highest priority issues facing New York’s residential market. Laura reviewed the top 3 themes, identified as:

1. Improving Market Awareness and Urgency for Residential Clean Energy and Energy Efficiency

2. Improving the Customer Experience with Air Source Heat Pumps
3. Ensuring Meaningful Stakeholder Engagement Opportunities and Clear Communications about the Inflation Reduction Act for New York State Residents and Contractors

Laura discussed sub-topics within each theme, including relevant NYSERDA programs. To appropriately scope future programming, including potential sub-group activities, RMAG membership were asked to provide additional detail on the scope of these topics.

Inflation Reduction Act Next Steps

After completing a review of priority meeting topics, Laura provided a brief overview of DOE's upcoming Inflation Reduction Act's (IRA's) residential rebate programs.

The two key rebate programs discussed were the Home Owner Managing Energy Savings (HOMES) and the High-Efficiency Electric Home Rebate Act (HEEHRA). Sub-topics covered included anticipated allocation of incentive and administrative funds, and a preliminary timeline for the planning and initial deployment phases of HOMES/HEEHRA funding.

In-depth discussion of IRA residential rebate programs is the tentatively scheduled topic for an in-person Q3 RMAG meeting to be held in or around September 2023. Attendees were invited to submit any questions and comments on HOMES or HEEHRA to residential.ira.nyserda.ny.gov.

BPI Total Building Performance Certificate

Overview

John Jones, National Technical Director from Building Performance Institute (BPI), Gabrielle Stebbins, Managing Consultant at Energy Futures Group (EFG), Andy Winslow, Senior Associate at Northeast Energy Efficiency Partnerships (NEEP), and John Balfe, Senior Manager of State and Community Solutions at NEEP, presented on BPI's new Total Building Performance (TBP) Certificate of Knowledge.

Total Building Performance Certificate Presentation

Introduction and Context: Andy Winslow explained that the TBP Certificate is part of NEEP's [Total Energy Pathways \(TEP\) program](#), which seeks to build the residential clean energy workforce that can deliver retrofits at the scale required to meet policy goals.

Prior Experience and Lessons Learned: Gabrielle Stebbins explained that the TEP program originated from a pilot program in Vermont called [Zero Energy Now \(ZEN\)](#). Instead of the typically piecemeal approach to residential clean energy and energy efficiency services, the ZEN program offered consumers a single 'whole-home retrofit' package that included weatherization, energy efficiency, electrification, and health and safety improvements. The ZEN pilot was a success, projects became more affordable for homeowners and contractors alike while driving significant carbon emissions reductions.

Gaps to Market Adoption Identified: Gabrielle noted several barriers to enhanced adoption of whole-home retrofit service packages. One barrier identified was that contractors were

interested in selling packaged services to consumers but there were few contractors with the requisite integrated knowledge of residential clean energy and energy efficiency improvements to deliver on that vision. In the absence of a contractor with integrated knowledge, consumers are forced to pursue each service in a piecemeal way, easily overwhelming the average homeowner due to complexity. For a simplified consumer experience, TBP proposes that contractors offer a single General Contractor to interface with clients, and that they have the requisite integrated knowledge to sell and deliver a single package of services.

Certificate for Knowledge Development: John Jones detailed the process for designing the certificate. Multi-stakeholder meetings were convened by BPI which included contractors, software developers, national laboratory staff, and other subject matter experts. On these calls, the group collectively identified the most pressing gaps in workforce development efforts and theorized how a certificate could be designed to best fill the gaps. Through these meetings, it was decided that a Certificate of Knowledge was the ideal structure for certifying this role. Rather than needing to be an experienced home performance specialist, this role benefits from a multifaceted skillset that can both ease customers through a whole-home retrofit process and coordinate across contractors to design a project that meets the consumer’s needs.

Pilot Exam Development In Progress: John Balfe covered the next steps for the certificate program, including development of the certificate’s exam. The exam will be a 100-question online test that will be piloted in August 2023. If interested in participating, email John Jones (jjones@bpi.org) and Gabrielle Stebbins (gstebbins@energyfuturesgroup.com).

Total Building Performance Certificate Poll

After the presentation, attendees completed a brief three-question survey on their initial reactions to information about the certification program. Results of the poll are:

Can you imagine this training being helpful in your region?	
Response	Number of Respondents (Percent)
Yes	30 (77%)
No	1 (3%)
Maybe	8 (20%)

If you think this would be helpful, who do you think would most benefit?	
Response	Number of Respondents (Percent)
Existing Contractors	4 (10.5%)
Program Implementors	1 (2.6%)
New Trainees (e.g., workforce programs)	7 (18.4%)
All of the Above	26 (68.5%)

Based on your understanding of the Certificate as presented, what level of building science knowledge and project management experience do you think a trainee for the Certificate would most likely hold?	
Response	Number of Respondents (Percent)

None (no experience whatsoever)	3 (7.7%)
Limited experience in the trades/building industry (2-12 months of experience)	12 (30.8%)
Some experience in the trades/building industries (1-2 years of experience)	22 (56.4%)
More experience in the trades/building industries (2+ years of experience)	2 (5.1%)

Total Building Performance Certificate Q&A

After the poll, Trevor facilitated a brief Question-and-Answer session with the presenters. Text of the questions and a summary of the Q&A responses are as follows:

Question Asked	Answer
Any projected timeline of when the certificate will be live? will the process be similar to BPI?	The certificate will be live as a pilot program in August 2023 and will fully launch in late 2023/early 2024.
Did the average project include deferred maintenance?	It is unclear if deferred maintenance is captured by energy savings or analysis of current energy costs, and that is a good suggestion. The ZEN program included information on heat pump refrigerants and emissions profiles in their training materials. This is another reason why the comprehensive whole-home approach needs continuous modification.
Does the different methods of determining savings affect the rebate amount?	While there is a potential that taking the modeled vs realized savings approach may affect the rebate amount, it is unclear absent further DOE guidance exactly what the impact will be.
Right now, a lot of NYSERDA incentives are limited to those on municipal electric due to the SBC charge. Is there any insight on how IRA incentives enable NYSERDA to connect residents who pay into municipal electric but not the SBC charge?	Absolutely, this funding from the federal government will be open to all residents of NYS. It will open more opportunities to residents who are in those municipal electric territories. More information to come in the upcoming months.
Does the 'hardship rule' apply to federal money administered by NYSERA which severely limits money that can go to NYC?	We are awaiting guidance from IRA funds from DOE but will take this comment into consideration.

NYSERDA Comfort Home Program

Overview

Keith Bohling, Senior Project Manager at NYSERDA, presented on updates from the [Comfort Home Pilot Program](#), which helps homeowners save money and improve comfort and health within their home through “seal and insulate” packages.

Comfort Home Program Presentation

“Heat Pump Ready”: The impetus behind the Comfort Home program was to test the effectiveness of selling and installing building shell measure improvements as a package rather than as individual upgrades. By offering packages and educational materials to homeowners,

the program aimed to build consumer confidence and ultimately increase heat pump adoption in NYS. The pilot program was launched in late 2019 and is now available statewide, SBC territory.

Three Standard Packages Based on Exit Criteria: Comfort Home offers homeowners three distinct incentive packages with incentives ranging from \$1,000 to \$4,000 depending on the scope of installed improvements. Projects are developed according to an incremental plan and all improvements within a package must be completed in the proposed order to be eligible for the incentives. By the end of this process, the goal is that a home is 100% “heat pump ready” and a reduced electrical load should be achieved.

Comfort Home’s Growth: The Comfort Home program has grown rapidly each year, thanks largely to making ‘stacked’ incentives available for homeowners in certain parts of the service region. In total, 3,528 MT of CO₂ has been abated by Comfort Home upgrades. Service providers have also modified their offerings to take advantage of program incentives. Keith shared a testimonial of a contractor who expanded their business from air sealing and insulation to include home performance, HRVs, and energy consulting. By employing a whole-home approach, the contractor routinely generates additional work in the form of improvements while generating cost efficiencies for the consumer.

Interested in Comfort Home?: Keith concluded their presentation by noting that NYSERDA anticipates using the Comfort Home program as the vehicle for delivering the IRA’s HOMES incentives to New York State customers. NYSERDA are interested in connecting with the following groups ASAP as they explore this opportunity:

- Contractors offering air-sealing, insulation, and heat pump installation services.
- Organizations decarbonizing communities.
- Utilities looking for a load reduction partner.

Contact Information: Interested parties are asked to contact Keith via email at Keith.Bohling@nyserdera.ny.gov or by phone at (518) 862-1090 x 3491.

Comfort Home Program Q&A

After the presentation, Trevor facilitated a brief Question-and-Answer session with Keith. Text of the question and a summary of the Q&A responses are as follows:

Question Asked	Answer
How does Comfort Home consider piecemeal services?	Individual improvements are supported by the NYSERDA Comfort Home program given all required pieces of a certain package are implemented.

NYSERDA Experience Clean Heat Program

Overview

Jackie Albanese, Project Manager and Contractor at TRC, presented on the NYSERDA [Experience Clean Heat Program](#), which puts the spotlight on heat pumps in public spaces, emphasizing the firsthand experience of how these technologies keep you comfortable.

Experience Clean Heat Program Presentation

Experience Clean Heat Goals: The program has several goals for funded experiential learning opportunities.

- To raise awareness, overcome misinformation, garner confidence, and cultivate viral enthusiasm for heat pumps as a solution for whole building heating and cooling needs.
- To create opportunities for consumers and HVAC workers to directly experience working, living, and going about their day-to-day lives in buildings heated and cooled with heat pumps.
- To magnify the impact of these experiences through sharing on social media (consumers) and peer-to-peer sharing (contractors).

Consumer Site Process Timeline: Highly trafficked consumer-facing sites which use heat pumps for heating and cooling are ideal sites for a program installation. The program is actively looking for high quality candidates for inclusion in the program, referencing businesses such as barber shops, breweries, and restaurants as potentially of interest. Jackie detailed the following workflow for project identification and installation:

- **Consumer Site Selection Criteria:** The sites are reviewed based on their Technical, Business, and Staff resources. If the site has a properly functioning heat pump that is not noticeable to consumers, meets basic business type and appearance requirements (dentist offices are bad options because they are not seen as comfortable), and have staff that can effectively answer questions and promote the social media campaigns, they are a strong match for the program.
- **Site Staff Training:** Once a strong site is identified, a brief 10–30-minute training course is held where on-site staff are taught how heat pumps work, provided information on ‘common misconceptions’, and are taught how to share information with customers through QR codes and/or verbal directions.
- **Communication Toolkit Deployment:** On the same day as the training, signage is hung on walls, tabletops, and other areas of the business. Social media posts and electronic materials are shared with staff to use on multiple platforms with the intent of driving traffic to informational platforms.

Current Participant Highlights: Jackie walked participants through two existing installations, one at Artisanal Brew Works in Saratoga Springs, NY, and one at Tree Huggers Children’s Apparel in Ballston Spa, NY, to familiarize participants with the typical layout and intent of an installation.

Next Steps and Contact Information: NYSERDA are actively reviewing potential sites that meet the above detailed criteria. This start-up pilot phase is targeting 15 sites throughout the Mid-

Hudson, Capital, and Buffalo regions. If you know any prospective sites that may be a good fit, please share them with Jackie via email at jalbanese@trccompanies.com or by filling out details on the Experience Clean Heat [website](#).

Experience Clean Heat Program Q&A

After the presentation, Trevor facilitated a brief Question-and-Answer session with Jackie. Text of the questions and a summary of the Q&A responses are as follows::

Question Asked	Answer
The copy used is very colloquial, what is the intent and what lessons have been learned about messaging?	The program is approach this as an effort to bring in a new audience. Resultingly, it is focused currently on a pithy and fun tone to pique interest. We’ve also learned that modifying signage to feel like it is unique and matches the character of the site is important.
When using social media to drive people to your resources and “meet them where they are,” what is your approach?	The program uses a two-pronged approach to advance social media messaging, leveraging NYSERDA’s social media accounts and the host sites web presence. The program is also exploring new ways to introduce augmented reality and tactics like gamification (e.g., fun quizzes) to support these efforts.
What are the best characteristics for sites?	You want a comfortable indoor location that is clean and shows the heat pump as something that you would want to buy. We are currently working in the Buffalo, Mid-Hudson, and Capital Regions but are expanding statewide so please provide any recommended sites you can think of.
What is the best place for interested parties to find resources on this program?	See the program landing page for all resources on this project: https://cleanheat.ny.gov/experience-clean-heat

Wrap Up and Next Steps

Trevor and Laura reviewed action items for RMAG membership and thanked participants for their attendance and active engagement.

Action Items

- An in-person RMAG meeting is being explored for September 2023. A post-meeting survey was distributed after the call asking attendees to provide details on their preferences for location, topics, and other considerations. This will be used to schedule the future meeting.
- If you would like to join the RMAG Listserv, you can sign up by visiting the [NYSERDA RMAG webpage](#) or by emailing resmarket@nyserda.ny.gov.
- Interested in being a pilot test taker for the Total Building Performance Certificate or know someone who might be? Click this registration link to sign up for more information: <https://forms.office.com/r/MYahMxvve2>

Laura closed the meeting by expressing her excitement for the RMAG’s growth and positive trajectory. Trevor adjourned the meeting.

Appendix A

RMAG Process Diagram

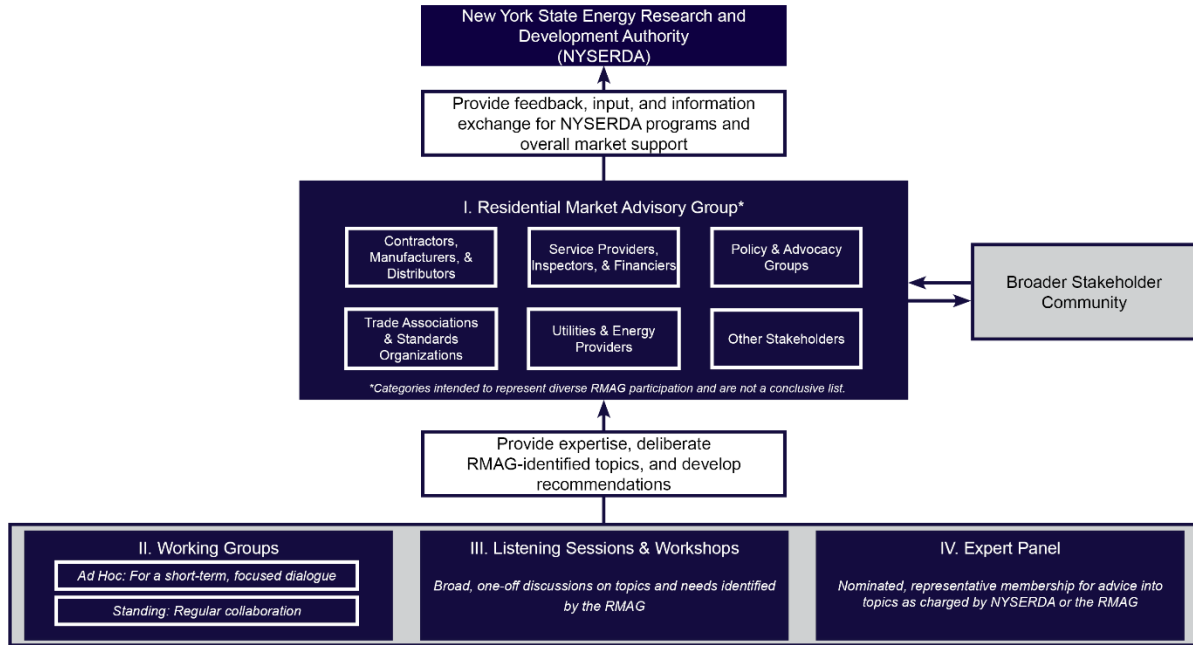


Figure 1: Information flow between stakeholder groups