

# Inflation Reduction Act (IRA): Home Energy Rebate Programs

## **Stakeholder webinar –** Implementation Blueprints Overview and Application Timeline

July 11, 2024



**NYSERDA**

# Using the Zoom Sessions Platform

- > To enter the discussion, add a question via the **Q&A Function**.
- > Video and audio Permissions are not generally enabled. During Q&A we may request verbal questions. Use the **Raise Hand Function** to indicate interest when prompted.
- > Please direct any technical questions to Laurel Cohen (Kearns & West) using the **Chat Function** or send an email to [lcohen@kearnswest.com](mailto:lcohen@kearnswest.com).



# Agenda

- **Welcome and introductions** (10:00a)
- **Status and timeline** (10:05a)
- **Lookback on previous meetings and takeaways** (10:10a)
- **Implementation Blueprints overview\*** (10:15a)
  - Seeking feedback on:
    - Community Benefits Plan
    - Consumer Protection Plan
    - Education & Outreach Plan
- **Lookahead on future meetings and topics** (11:25a)

*\* These plans are still subject to change as they goes through the DOE review process.*

# General stakeholder engagement strategy

1. Provide **transparent information throughout the planning process** so stakeholders are aware of the rules and constraints we must work within as well as the goals and objectives we are aiming to achieve with this funding.
2. **Seek input and feedback from interested parties**, particularly in terms of successfully reaching a broad market, and with special attention toward ensuring IRA program designs align with existing market business models and achieving material impact toward stated goals and objectives.
3. **Use stakeholder feedback to inform program design decisions** and assess trade-offs necessary to balance the many interests represented among stakeholder parties and the need for broad reach and progress toward market transformation without adversely impacting already overburdened households.

# Engagement approaches

Type	Audience	Description
<b>Work Groups</b>	<i>SF contractors, community partners, utilities, MF service providers</i>	Small groups of similar stakeholders designed to convene more than once in working sessions to provide deeper insights on targeted questions/challenges the program planning team is facing. Work groups may be invitation only, but generally kept to a small, manageable number of participants to be effective. Disadvantaged community partners are compensated for their time in alignment with NYSERDA's Energy and Climate Equity Strategy and related policies.
<b>Roundtables</b>	<i>Retailers, manufacturers, HVAC contractors, plumbers, electricians</i>	Non-recurring, structured discussions of stakeholders with similar interests and business priorities.
<b>Individual Meetings</b>	<i>Housing agencies, utilities, LIPA</i>	For stakeholders who work in direct partnership with NYSERDA to deliver energy efficiency and beneficial electrification solutions to the market. While not a full-fledged co-design process, these engagements will take a deeper dive to establish direct collaboration opportunities.
<b>Voice of customers (VOCs)</b>	<i>Key stakeholders</i>	Individual 1:1 meetings with owners and clean energy providers that have been at the forefront of building decarbonization in New York and that have experience with using different types of clean energy programs. These meetings will be used to gather candid feedback on proposed model to roll out HEAR/HER incentives in the multifamily and single family residential markets.
<b>Webinars and other recurring meetings</b>	<i>Industry partners and interested parties</i>	Scheduled on a recurring basis and open to all. These meetings provide opportunities for NYSERDA to offer informational updates and to engage in structured discussion using topic-specific breakout sessions and large group forums.
<b>Public Meetings</b>	<i>All</i>	Public meetings are fully open to all who wish to attend. They are designed to provide transparent information and updates with opportunity for public comment.

# Status and timeline

Spring/Summer '23

Fall/Winter '23

Q1 2024

Q2-Q4 2024\*

- Systems Planning
- RFI response submitted to DOE
- **Stakeholder engagements and cross-state collaboration**

- NYSERDA **secured early Admin funding** from DOE
- Rules review and clarification with DOE
- **Stakeholder engagement on HEAR/HER rules & considerations**
- **Partial-scope application for HEAR for EmPower+ submitted to DOE** to expedite New Yorkers' access to rebates and benefits

- **DOE review** of partial-scope application
- **Stakeholder engagement** on **strategy and program design** for “shovel-ready” elements of Rebate programs.
- **Implementation Blueprint Submission for partial-scope application**
- Implementation planning for partial-scope HEAR roll out through EmPower+

- **DOE approval** of partial-scope application and **release of funding**
- **Launch of partial-scope HEAR for EmPower+**
- **Stakeholder engagement** to shape **forthcoming offerings** and drive **continuous improvement** of active programs.
- **Application submitted for and phased roll-out** of full range of Home Energy Rebate **funding for all eligible customer segments** by end of 2024.

\* estimated



# HER/HEAR full application schedule



This webinar series

May

June

July

August

Sept

Oct

Application Development



Application Submission



Stakeholder Outreach



Community Outreach



Imp Plan Development



Imp Plan Submission



Retailer/Contractor Enrollment



Systems upgrade



DOE Review & Approval



HEAR/HER Anticipated Start



# Lookback on previous meetings and takeaways

Segment	What we heard	NYSERDA's response
<b>Small residential</b>	Align services based on income levels as defined by federal definitions of income eligibility	To accelerate launching into market, NYSERDA will leverage its existing EmPower+ and Comfort Home programs to support delivery of HEAR and HER rebates for 1-4 unit buildings. Additionally, existing program workflows, systems, and contractor networks will be leveraged to streamline access and administrative costs.
<b>Multifamily</b>	There are limited to no ENERGYSTAR options for central heating, cooling, and water heating systems suitable for multifamily buildings	NYSERDA sought additional flexibility from DOE and succeeded in obtaining revised guidance allowing states to propose to use available systems subject to an alternative equipment efficiency standard for DOE review and approval.
<b>Retail</b>	There are already midstream heat pump water heater offerings currently available in the market	NYSERDA is planning to prioritize its initial implementation of retail point-of-sale rebates on heat pump dryers and induction stovetops



# Community Benefits Plan

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

*Designed to ensure broadly shared prosperity in the clean energy transition. The purpose of this document is to summarize specific objectives in quantifiable terms with specific, measurable, achievable, relevant, and time-bound (SMART) milestones. The Plan is comprised of four pillars:*

Category	NYSERDA Commitment
<b>Community &amp; Labor Engagement</b>	Coordination, consultation, and engagement with partners and community stakeholders.
<b>Engage &amp; Support a Skilled &amp; Qualified Workforce</b>	NYSERDA will support contractors with tools and training resources to support a skilled and qualified workforce with both existing and new resources.
<b>Diversity, Equity, Inclusion &amp; Accessibility</b>	Reduce barriers to improve access to local/underrepresented workers and partner with community-based job training providers. Signage (and hard-copy collateral materials) in stores and on web available in multiple languages.
<b>Contributing to the Justice40 Initiative</b>	Deliver the energy services to customers of underserved or disadvantaged communities in ways that can reduce energy burden.

# Consumer Protection Plan

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

*Outlines a multipronged approach, including a robust customer feedback and contact information system, a detailed customer concern resolution process, and a structured qualification process for contractors. This document will be available to the public.*

Key features	Detail
<b>Qualified Contractors and Qualification Process</b>	NYSERDA currently maintains a network of approved single-family and multifamily contractors across NYS, ensuring they meet specific certifications and program requirements. This contractor qualification process includes requirements for oversight of subcontractors and emphasizes the importance of maintaining up-to-date certification documentation and complying with program standards.
<b>Installation Requirements</b>	Standards for program installations are established in program manual. These requirements detail that all work must strictly adhere to state and local laws, codes, and permits, as well as program installation criteria and manufacturers' specifications.
<b>Operational Process</b>	A series of practices to provide checks and balances as projects proceed through the workflow from audit, project reviews, to payment.

# Consumer Protection Plan (cont'd)

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

Key features	Detail
<b>Customer Feedback</b>	NYSERDA employs a dedicated system to handle customer questions, concerns, and complaints that is accessible via email and a toll-free number.
<b>Consumer Satisfaction Surveys</b>	Conducted quarterly for all completed projects, these surveys gather feedback on various aspects of the program, from the application process to the quality of work and benefits experienced post-project.
<b>Customer Concern Resolution Process</b>	NYSERDA employs a thorough feedback process, consisting of several stages from initial concern to mediation and, if necessary, escalation. Tactics include written warnings, mediation efforts, and potential disciplinary actions against contractors failing to address concerns adequately. Participating contractors must maintain their own dispute resolution policy that includes protocols for a timely response and amicable settlement of any issues.

# Consumer Protection Plan

## (cont'd)

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

Key features	Detail
<b>Post Installation Quality Assurance</b>	NYSERDA provides third-party QA and monitoring. The QA inspections verify the work scope agreed upon in the contract, the accuracy of site analysis, and ensure that installations comply with program stipulations, industry standards, and elements of the New York State Uniform Building Code as they relate to specific measures within the project work scope and the overarching quality of the installation.
<b>Project Issues Resolution Process</b>	A defined process for addressing any non-compliance issues identified during quality assurance inspections. This includes corrective measures for any problems found and a structured approach for contractors to demonstrate compliance.
<b>Continuous Improvement</b>	NYSERDA is committed to preventing fraud, waste, and abuse within its programs. Included are mechanisms for price review, project workflow automation, quality assurance (QA) procedures, and formal program evaluations to ensure the highest standards are maintained.

# Education and Outreach Plan

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

*Describes how NYSERDA will leverage its existing marketing and outreach efforts and network of contractors, and add supporting activities, to provide effective communications and outreach to both customers and contractors as well as retailers.*

Audiences		
Households	Contractors	Retailers and distributors

Strategies		
Outreach partnerships	Outreach channels	Household planned activities

# Education and Outreach Plan

## (cont'd)

Seeking feedback – what additionally can NYSERDA be focusing on? Please provide ideas, examples, etc.

Strategy	Examples	
<b>Outreach partnerships</b>	<ul style="list-style-type: none"> <li>Regional Clean Energy Hubs</li> <li>Customer referrals</li> <li>Housing agencies</li> <li>Residential housing organizations</li> <li>Community benefit organizations</li> </ul>	<ul style="list-style-type: none"> <li>Local / regional governments</li> <li>Public housing authorities</li> <li>Utilities</li> <li>Qualified contractor networks</li> <li>Retailers and manufacturers</li> <li>Trade Associations and Unions</li> </ul>
<b>Outreach channels</b>	<ul style="list-style-type: none"> <li>NY Energy Advisor</li> <li>Public service announcements</li> <li>Statewide paid media</li> <li>Social media</li> <li>(Future, new) “My Energy Portal”</li> <li>NYSERDA Qualified contractor networks</li> <li>Webinars</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder advisory groups (e.g., NYS Residential Market Advisory Group [RMAG])</li> <li>Regional Clean Energy Hubs</li> <li>U.S. Environmental Protection Agency (EPA)</li> <li>ENERGY STAR work groups</li> </ul>
<b>Household planned activities</b>	<ul style="list-style-type: none"> <li><u>SE</u>: digital banner ads, paid social media, paid search, streaming radio</li> <li><u>ME</u>: community engagements, stakeholder webinars, paid search campaign, social media, banner ads, distribution list emails, events and conferences</li> <li><u>Retail</u>: retail floor marketing, direct in-store events, community events, co-op branded advertising, utility account messaging, email blasts, paid search</li> </ul>	

# Resources

## Links to Learn More and Stay Engaged

### > **More Information on the Inflation Reduction Act:**

<https://www.nyserda.ny.gov/All-Programs/Inflation-Reduction-Act>

### > **DOE Guidance on Home Energy Rebate Programs:**

<https://www.energy.gov/scep/home-energy-rebates-programs-guidance>

### > **IRS Guidance on Energy-related Tax Credits and Deductions:**

<https://www.irs.gov/credits-and-deductions-under-the-inflation-reduction-act-of-2022>

### > **NYSERDA's Energy Climate Equity Resources:**

<https://www.nyserda.ny.gov/All-Programs/Energy-and-Climate-Equity-Strategy>

### > **State-Based Home Efficiency Contractor Training Grants:**

<https://www.energy.gov/scep/state-based-home-energy-efficiency-contractor-training-grants>

### > **Stay engaged by following NYSERDA's Residential Market Advisory Group:**

<https://www.nyserda.ny.gov/Residential-Market-Advisory-Group>