

Wednesday, April 16, 2025 | 1:00 PM– 3:00 PM

Contractor Technical Advisory Committee (CTAC) Meeting Minutes

[Meeting Recording](#)

Discussion

1. Department of Energy and Environmental Protection (DEEP) Introduction

DEEP reviewed the meeting agenda, focusing on Residential topics.

2. Public Comment 00:07:40

Public comment from Edgardo Mejias.

3. DEEP Updates 00:10:15

DEEP provided updates on federal funding, the 2025-2027 Conservation and Load Management (C&LM) Plan Determination, Optimization Plan Determination, and the proposed Home Energy Solution (HES) and Home Energy Solution Income-Eligible (HES-IE) Redesign Determination.

a. Federal Funding

- DEEP continues to work on all federally funded programs that have been contractually obligated to CT DEEP as required under the terms of awards. DEEP is also working with the Attorney General's Office to ensure any funds that have been frozen are released as required by law.
 - Inflation Reduction Act (IRA) Rebates. DEEP continues to work on contracts with the Utilities and Blueprint submissions to the Department of Energy (DOE). DEEP is planning to launch Home Electrification and Appliance Rebates (HEAR) in mid- 2025 and Home Efficiency Rebates (HER) in early 2026.
 - New England Heat Pump Accelerator. The Request for Proposal (RFP) for a program implementer closed on April 10th. The proposal review is now underway with the aim of selecting an implementer(s) before summer.
 - Solar for All. DEEP anticipates financial assistance for multifamily affordable housing properties interested in installing solar will be available by the end of June 2025 and financial assistance for single family homes will be available later this summer.
 - Weatherization Assistance Program (WAP) Coordination. DEEP has been collaborating with the utilities and technical consultants to finalize the cost sharing narratives for both the single-family and multifamily programs. DEEP has reviewed the latest public comments on these plans. DEEP expects the plans will be living documents that may be updated in the future, but DEEP is working to get these plans posted next week to enable implementation this quarter.

b. Determinations.

- DEEP will be issuing separate determination documents on the proposed 2025-2027 Conservation & Load Management (C&LM) Plan and the Optimization Plan. DEEP issued a Draft Determination on the proposed redesign of the Home Energy Solutions (HES) and Home Energy Solutions- Income Eligible (HES-IE) programs on April 7, 2025.
 - i. Draft 2025-2027 C&LM Determination: DEEP has reviewed the Companies' updated March filing of the 2025-2027 C&LM Plan with Optimization Plan attachments. DEEP is aiming to issue a Draft Determination on the 3-year Plan shortly which will include an opportunity for written comments.
 - ii. Optimization Plan Determination: DEEP expects to be issuing a Determination on the Optimization Plan during this Program Year.
 - iii. Proposed HES/HES-IE Redesign: A draft determination was issued on April 7, 2025, with written comments due April 16, 2025. DEEP welcomed public comment during the CTAC meeting as well.
 - a. **Proposed Redesigns within the Draft Determination include:**
 - **HES-IE - two-visit model only:** DEEP finds that this will allow for the identification of Health and Safety (H&S) barriers early in the customer engagement process and that it aligns with federal program requirements.
 - **HES single family - hybrid model:** Allows for some flexibility. DEEP requires that the Companies and the Technical Consultants standardize how required technician hours are determined. This sets a maximum limit on air sealing hours included in the first visit and shifts additional air sealing to an add-on measure to cost-share the increased air sealing hours with customers.
 - **2-4 unit - two-visit model:** Identifies Health and Safety (H&S) barriers and helps to improve landlord engagement. DEEP requires that the companies develop a formal support channel for contractor/landlord engagement.
 - For HES, DEEP will require that the Companies track if a one-visit or two-visit model is used in each home, and to track all issues pertaining to quality assurance/quality control (QA/QC) and scopes of work. DEEP also directs the Utilities to track drop-out and follow-up rates. DEEP expects to issue the final determination shortly after reviewing comments.
- c. **Questions/Discussion 00:15:25**
 - Stephanie Weiner asked about federal funding security for programs.
 - Becca Trietch, DEEP, stated that at this point DEEP does have access to funds and is working to adhere to all requirements within the signed contracts. DEEP continues to work to implement these as quickly as possible.
 - Stephanie Weiner's second question was regarding the multifamily Weatherization Assistance Program (WAP) program and the current budgets for single family and multifamily.
 - Becca Trietch responded that the single family WAP program is typically 3 million to 3.5 million dollars each year. The multifamily budget was a one-time allocation to DEEP of 46 million dollars under the Bipartisan Infrastructure Law (BIL). The 46 million dollars is spent over multiple years and therefore will be a multi-year effort to spend these dollars on the multifamily side.
 - The latest WAP Request for Proposal (RFP) was for a 3-year cycle, the last program year under that cycle will end June 30, 2026.

- Ryan Behling expressed concern regarding the air sealing hour cap stated within the HES and HES-IE Proposed Redesign Determination. Mr. Behling referenced the recent evaluation studies that pointed out a need for additional air sealing, that not enough was being done historically. Mr. Behling suggested that to cap the air sealing hours at a historic average performed was counterproductive to this idea. While there is an understanding that contractors would be able to consider additional air sealing as an add-on, the customer would be responsible for portions of that cost. Mr. Behling stated this might be a difficult conversion, and there would likely be a customer drop off. He explained that air sealing is a much less tangible measure in comparison to insulation, HVAC, or windows. There was concern expressed that even with good customer education, it could potentially be a harder sell than if offered at no cost. Mr. Behling also agreed with the concern addressed previously regarding relevant historical data on the amount of time spent air sealing. In the past, contractors were not incentivized by hours, but by cubic feet per minute (CFM). He explained that because the data was not attached to payment, there might not have been enough QA/QC involved. Regarding QA/QC, Mr. Behling shared his opinion that there may be difficulty with the post inspection system in identifying if there was a missed opportunity or if the vendor simply ran out of time. He shared that he thinks it could lead to a lot of customer satisfaction issues, especially when confined to an air sealing priority list. Examples were provided of potential issues where a contractor would not have enough time to do everything that the customer is looking for at no cost. Mr. Behling recommended that if there needs to be a cap on hours, that it should relate to the home size or age, similar to the original proposed model.
 - Edgar Encarnacion agreed with Mr. Behling's comment.
 - Vivian Perez agreed with the hourly concern and provided comment. Ms. Perez noted that if the model splits the air sealing between what is being paid and what is not being paid, it will be harder for quality control and quality assurance. Ms. Perez shared her opinion that the program is too early on rolling out the current request for information (RFI) for pricing, referring to tariffs and the unknown pricing for different products. Concern about convincing customers was expressed and the justification of return on investment (ROI) when the customer is already paying a copay. Ms. Perez shared an example that if an additional cost is added to air sealing when completing attic insulation, then this goes away from what contractors are supposed to do, which is attic, basement, garage, and it changes the whole emphasis of the entire program. She stated that most "sister programs" throughout the United States pay 100% for air sealing. Ms. Perez noted there is fear of a creating a "bait and switch" situation, as contractors do not know how many hours work should be based on because that was never a prior criterion. She emphasized the purpose of the redesign was to do more in a house. Ms. Perez expressed agreement with other aspects of the redesign and the decision to implement a two-visit model.
- Becca Trietch opened a conversation with contractors on how a full-cost coverage option should be paid if it does not come from the customer, given limited C&LM program budgets. There is concern about DEEP paying more for air sealing and not being able to determine whether realization rates improve until after an evaluation study has been conducted.
 - Edgardo Mejias shared comments that full coverage is a question that can be asked for every measure being offered, and it comes down to prioritization of measures

and determining what is most impactful. Edgardo Mejias pointed out that historically, air sealing and insulation have had the highest return on investment and have been most important to residents. Mr. Mejias stated that this is a demand reduction mechanism, regardless of the heating fuel a customer has.

- Mr. Mejias pointed out that currently, contractors do blower door guided air sealing to bring the house to a recommended minimum ventilation guideline (MVG) and emphasized the need for proper building science when addressing a home. He indicated that following a “cookie cutter” approach of being told where to air seal and how much time to spend, is the opposite of a whole home building science approach.
- Mr. Mejias referenced air sealing study results that addressed differences between recorded air sealing CFM results in an inspected project versus a non-inspected project. He noticed that the gap between the inspected and non-inspected projects were relatively the same in percentages, and did not achieve closing that gap. However, he noted that the overall CFM reduction amount from the air sealing recorded decreased. He shared an opinion that this could be an indication that the path the program is taking with air sealing, just addressing certain portions of the home or dictating how much time, will not achieve the program goals.
- Mr. Mejias noted that with increasing inspectors for QA/QC, costs will increase for inspection, and this may trigger a budget cap as well. He suggested this increase in QA/QC may not be beneficial or show any additional savings, and there should be more time to discuss such budget details.
- Edgar Encarnacion agreed with this comment and added that air sealing in combination with insulation propels the measure to reach the maximum amount of CFM savings.
- Ryan Behling suggested that a cap could be placed on air sealing that still considers factors of the house and could be variable compared to a flat rate across all jobs.
- Ben McMillan clarified that within the HES Redesign Draft Determination, DEEP required the Technical Consultants and Utilities to work with Contractors to establish such criteria.
- Stephanie Weiner asked why the federal heat pump funding could not be used for heat pumps in the C&LM program.
 - Becca Trietch explained that the Heat Pump Accelerator funding is directly targeted at midstream incentives. Customers would not necessarily see that money clearly through a direct rebate. It will help to reduce the cost of heat pumps across the region, at the midstream level.
 - Discussion shifted to the Incentive Qualification Tool (IQT). Contractors provide an IQT to the Utilities for HES-IE projects to account for a measure incentive. IRA rebate funds are expected to be in this process as well.

4. Utility Updates 00:42:20

a. HES/HES-IE Pricing RFI

- Amy McLean of Avangrid presented that the purpose of the HES and HES-IE Pricing Request for Information (RFI) is to expand program measures and update the measure pricing for the HES and HES-IE programs. This is to be issued in April 2025, along with a period of time for input with responses due by May 2025.

b. HES-IE Vendor RFP

- Jordan Schellens of Eversource presented the HES-IE Vendor RFP has a target issue date for September 2025 with an RFP due date of October. Ideally, new purchase orders (PO) will be in place for January 1, 2026.

c. Attic and Knee Wall Access- Proposed Changes

- Two updates were provided to the attic and knee wall access. Homes that have inaccessible knee walls or attics, but no other barriers to running a blower door test, will be addressed through a pressurized blower door test with customer advisement and approval. This will limit the risk of any unknown contaminants being pulled through the home.
- The other update provided included the direction to conduct only pressurized duct leakage to the outside testing.

d. Vendor scorecard relaunch process summary

- A vendor scorecard timeline was presented with the update that there was a soft launch on March 17, 2025. There will be a 6-month period before the final metrics are in place with the new scorecard going live on September 17, 2025.
- Components of the vendor scorecard include:
 - An insulation metric. The calculation uses insulation completions and recommendations and uses a 6-month rolling average.
 - A DOE home energy score. This is a calculation on single unit homes.
 - The scorecard Data. This will show annual progress, and the results will be anonymized.
 - New design. The updated scorecard is easier to understand and to maintain than the last version of this. The scorecard design was presented for a visual preview.

e. Status of enhanced customer reports

- The Companies shared that they have been working with an external firm to facilitate the customer report redesign. Currently, there is a scope of work and continued negotiation. The launch of this customer report will be on hold until the program redesign has been confirmed. The process will include engagement of stakeholders such as DEEP, Vendors, etc. This effort will also include an assessment of the DOE home energy score collection in the Hancock Mint mobile tool, as well as an addition to the US Green Building Registry. Currently, customers receive an Energize Connecticut and Home Energy Score report separately, the goal of this effort is to have the two reports combined.
- The Companies stated that the vendor is DOE certified and intends to take data that the Utilities currently use in the Hancock Mobile Audit Tool as well as data used for the DOE score to perform an assessment. Then, the vendor will come back with some sample layouts of presentations for a stakeholder review process. There will be one designed report, but with other stakeholders providing input to it. Additionally, the current reports use net savings, and the new reports should provide customer gross savings.

f. Status of online dashboard update

- Steve Bruno of Eversource provided an update on the Utility dashboard redesign. Connecticut and Massachusetts jointly completed a request for proposal (RFP) process for each of the state's energy data dashboards. Connecticut's is CTEnergy-board.com. Currently, Connecticut has two dashboards, one geared primarily towards municipalities such as town by town information and heat pumps, the other dashboard is geared toward program savings and metrics. Both states are working with the vendor, Launch. Launch is going to use Microsoft Fabric and Power BI to improve the functionality, make it more user friendly, and provide maintenance enhancements. The dashboard will enhance transparency with program performance reporting as well as include some items DEEP had provided in the prior compliance determination for reporting capabilities and trend analysis. It will also help track Connecticut's energy savings and greenhouse gas reduction goals.
- The 32-week project roadmap and timeline were presented, with the three project phases for roadmap building, dashboard execution, and ongoing maintenance.

g. Questions and discussion facilitated by DEEP

- Vivian Perez expressed concern regarding rollout timeframe of the pricing RFI, and shared thoughts that the redesign should be set before establishing pricing.
 - DEEP is committed to working to get through comments and considerations as quickly as possible. The written comment period for the HES and HES-IE Proposed Redesign Determination closed on April 16th, 2025.
- Vivian Perez questioned if material price increases will be taken into consideration for the RFI, as pricing will be given in April 2025 for work that will be completed in January 2026. It was also shared that suppliers have indicated price increases due to tariffs, and are not currently holding prices. Ms. Perez indicated supplier prices are "day-to-day" at this point.
 - The Companies acknowledged this point and responded they do not have an affirmative answer right now but will have to discuss and take this into consideration. The Companies explained at this point, the process is first to receive the Redesign Final Determination from DEEP and then figure out how to adjust.
 - DEEP acknowledged this uncertainty but expressed there is still a need for planning and accomplishing an RFI while accommodating for potentially large swings, especially substantial tariffs.
 - Edgar Encarnacion questioned who to contact from the utilities regarding the WAP program.
 - Becca Trietch responded to reach out to the WAP team at DEEP for direct utility contacts to coordinate.
- Vivian Perez asked for an update on Residential Energy Preparation Services (REPS).
 - Becca Trietch provided an update. As discussed at previous Energy Efficiency Board (EEB) and Residential Committee meetings, REPS has expended all available funding, and new referrals are being placed on a waiting list. DEEP is in an active investigation with International Center for Appropriate and Sustainable Technology (ICAST). DEEP is currently assessing options for the next iteration of REPS and hopes to share updates soon.

- Becca Trietch stated that Contractors should direct REPS customers experiencing issues to DEEP. DEEP is asking that these REPS customers connect through the deep.energybureau@ct.gov email address.
- Edgardo Mejias questioned the documentation updates regarding administrative costs, QA/QC, and field implementation manual, and if this will be completed before the RFI process begins.
 - The Companies shared they have a document ready to go but are waiting for a redesign determination from DEEP in order to issue an RFI. The Companies are also working on a “cheat sheet” on QA/QC for the Vendor as well, so they know what the Companies are looking for. The Companies expressed they want to be in tune with what the Vendors need and will provide the Draft Operations Manual and supporting documents if needed.
- Discussion continued regarding the DOE Home Energy Score. The Companies explained the Home Energy Score helps collect data for the program while also giving homeowners in Connecticut the opportunity to understand their own energy usage. For HES, the Companies are aiming for 50% of the homes completed to have the score done, and for HES-IE, are aiming for 40%. The Companies connected this to the four overall criteria in a vendor scorecard. There are inspection metrics, installation metrics, compliance items, and then the DOE score adoption rate. The vendors are being scored based on whether the customer receives the home energy score or not, not the score itself.
 - Edgardo Mejias shared that customers can be cautious of partaking in the DOE score due to fear of low results and the impact to their home value from the Home Energy Score. He expressed opinion that this voluntary customer participation is not reflective of contractor field performance.
 - Edgard Encarnacion shared that the purpose of the DOE score is for Vendors to show the initial score, and after the measures are completed, show an improvement on the score. Mr. Encarnacion stated they also have to educate the customer from an investment to return perspective, which will go into the report. He noted that a customer can use this to value their house better for selling, and he has not heard about something being wrong with the scores.
 - Amber McDonnell shared experiences with the DOE score, stating that there have been mixed reviews on score accuracy. Ms. McDonnell stated that technicians generally do not have trouble getting the customers to agree to proceed with the initial score, and encouraging a final DOE score after the customer has taken advantage of the additional rebates, add-on measures, and insulation, etc. However, Ms. McDonnell does not always find that the revised score shows much improvement and hopes that there could be enhancement in the accuracy of the DOE score.
 - DEEP encouraged the Companies to consider this feedback to ensure a positive customer experience.
 - The Companies clarified that there is a follow up with customers to update scores after they installed add-on measures. They also indicated that there are training opportunities for vendors to learn about score benefits and communicating these to customers.

5. Utility Presentation & DEEP Facilitated Discussion 01:15:07

a. Optimization Plan Part B. – Contractor Diversification

- Michael Goldman of Apex Analytics and Sam Malloy of Eversource provided an overview of the section of Part B of the Optimization Plan that reviewed Contractor Service Offering Diversification. Michael Goldman reviewed the initial direction from DEEP, barriers to diversification, opportunities for contractors, and types of trainings. The specific categories of focus were general trainings, specialized trainings, intra program diversification, and inter program diversification.
- The Companies believe that contractors should understand core building science principles and have designed trainings to meet this need. The Companies are actively working to identify and fill gaps in trainings. Weatherization trainings can be particularly helpful. Intra program opportunities and trainings that are focused on helping contractors operate within a program to learn new skills that can be applied within that program. Inter program diversification is to help contractors learn about other EnergizeCT programs to work across multiple different program and customer types.
- In 2024, Companies offered over a dozen trainings that covered a range of programs and customer types.
- Online courses were also an option for contractors. Over 2,000 contractors were assigned courses, with the majority being completed. In terms of demographic data, 87% of heat pump trainings were taken by contractors with more than 5 years of industry experience. Data is collected through anonymous pre- and post-training surveys, and typically includes age, ethnicity, gender, identity, education, and level years of industry experience. The post training survey asks about barriers for attending the training.
- Michael Goldman indicated that the program managers are looking into additional areas that could be worthwhile for the companies to explore.
- Apex Analytics also had some ideas on primary research that could potentially be beneficial for the companies and would likely help in refining trainings and other resources provided to contractors. They thought it may be helpful to interview contractors to get a better understanding of whether they knew about all the different trainings being offered, and to understand what channels were most effective at spreading the word about these trainings.

b. Question & Discussion

- Sarah Lewis, DEEP, asked how gaps in training are identified and if market trends are considered when looking at trainings. Samuel Malloy responded that team members are actively engaged with contractors and making sure that feedback is collected. Starting at the end of 2024, the Companies also conducted an internal needs assessment. The Companies are working to collect data across many different places, with the main goal of looking at the cross-training conversation. Ricky Jordan, of Eversource, mentioned that there is a lot of opportunity for weatherization in the small and micro business realm.
- Elizabeth Lodge, DEEP, asked how it is determined if programs have an open or closed market for contractors. Ricky Jordan, Eversource, noted that it's helpful to have networks of contractors that have been fully vetted by the Companies. The Companies need to be sure that there is a workforce available for small business and micro business customers.
- Becca Trietch, DEEP, asked if there were current limitations that only contractors in particular programs or areas can take certain trainings. The Companies indicated that there aren't necessarily restrictions in place, but that certain groups of customers tend to move towards certain training types. Samuel Malloy indicated that the Companies are looking at historical project data, program performance and technological advancement to determine which

trainings to promote. Vendors aren't restricted from participating in any trainings, but the Companies are thinking critically about how events are marketed. In the future they'll be looking for additional opportunities.

- Ben McMillan, DEEP, asked if most residential contractors are part of the Connecticut Installation Installers Network (CTIIN). The Companies noted that if they are installing insulation, then they are typically part of the network. Ben McMillan asked if there are clear pathways to join, to which the answer was yes. The same is true for the Heat Pump Installer Network (HPIN).
- Becca Trietch, DEEP, asked if trainings help to cover the cost of getting somebody an HVAC license. Samuel Malloy indicated that HVAC has multi-year apprenticeships, and the trainings offered are aligned with the 3-year plans but usually do not cover foundational licensing.

6. Other topics/ Open Discussion 01:47:06

- Edgardo Mejias, noted a couple of points for training improvement. It would be helpful if there were more opportunities for feedback. There have been significant changes in the programs already, including QA/QC. There needs to be trainings on new items, as well as having documentation and training materials on internal processes for all the tools used in these programs. There's a lot of room for interpretation, calling for the need for additional trainings and clear documentation of expectations. Becca Trietch, DEEP, asked if the lack of clarity around standards and procedures is causing a learning curve that is potentially a barrier. Edgardo clarified that contractors are struggling with existing programs and design. Jordan Schellens from Eversource noted that they are working on internal guidelines to share what they are updating about the QA/QC process. Jordan Schellens noted that for HES and HES-IE contractors, they should talk to their Energy Efficiency Consultants (EECs) about potential gaps in trainings.

7. Public Comment

- No public comment.

Announcements

1. On October 10, 2024, DEEP issued a letter to the Companies asking them to pause their RFI and RFP processes related to the proposed HES and HES-IE changes. On October 28, 2024, DEEP issued a request for written comments on the proposed public process.
2. December 31, 2024, DEEP issued a Notice of Progress and Technical Meetings. DEEP will be hosting a technical meeting regarding the HES and HES-IE redesign on February 25, 2025, and March 18, 2025, at 10:00am EST.
3. DEEP encouraged the Companies, Program Contractors, and the Energy Efficiency Board Technical Consultants to collaborate on a solution regarding the proposed residential program changes. A meeting was held on December 13, 2024, and summary notes were provided to DEEP. DEEP lifted the Vendor Pricing RFI restriction. A follow-up meeting was held on January 31, 2025.
4. April 7, 2025, DEEP issued a draft determination on the proposed HES/HES-IE Redesign, with written comments due April 16, 2025. DEEP lifted the restriction on the issuance of a vendor RFP imposed in its October 10, 2024, letter.
5. The CTAC Tracker is up on the CTAC website, which will be updated following each meeting.

6. The next CTAC meeting is scheduled for June 18, 2025, at 1:00pm EST and will cover both residential and commercial and industrial topics.