

CHS Equity Advisory Group - Credit Ownership Subgroup Meeting
May 8, 2024, 2:00 - 3:30 PM
Agenda

Meeting Link: <https://cbi-org.zoom.us/j/87383177532>

Participant Agenda

5 mins	Open	Ashira
70 mins	Discussion	Subgroup
10 mins	Comments	Ashira
5 mins	Close	Ashira

Staff Proposal: Initial Ownership of Clean Heat Credits

Introduction

The delivery or installation of clean heat measures for end-use customers in Vermont will create clean heat credits.¹ A clean heat credit is a tradeable, nontangible commodity that represents the amount of greenhouse gas reductions attributable to a particular clean heat measure.² A clean heat credit can be divided, traded, transferred, bought, sold, or held until it is retired.³ Customers and entities are free to enter into contracts transferring ownership of credits as they see fit. We acknowledge that different clean heat measures have different characteristics and distinguish installed measures (e.g., weatherization, heat pumps, etc.) and delivered measures (e.g., biofuels, renewable natural gas, etc.).

Obligated parties consist of a regulated natural gas utility serving customers in Vermont, entities that import heating fuel for ultimate consumption within the state, and entities that produce, refine, manufacture, or compound heating fuel within Vermont for ultimate consumption within the state.⁴ The Commission must establish the number of clean heat credits that each obligated party is required to obtain and retire each calendar year.”⁵ An “obligated party may seek to meet its requirement, in whole or in part, through one or more of the following ways: by delivering eligible clean heat measures, by contracting for delivery of eligible clean heat measures, or through the market purchase of clean heat credits.” 30 V.S.A. § 8125(d)(1). “All eligible clean heat measures that are delivered in Vermont beginning on January 1, 2023, shall be eligible for clean heat credits.” Section 8127(k).

Pursuant to 30 V.S.A. § 8127(b), the Commission must establish a standard methodology for determining what party or parties will be the owner of a clean heat credit upon its creation.

The Commission has issued orders requesting comment and held a workshop regarding the methodology to apply to the initial credit ownership determination.

Public input included the following suggestions for determining initial credit ownership:

- Clean heat credits would initially go to the installer or deliverer.

¹ 30 V.S.A. § 8123(3): “Clean heat measure” means fuel delivered and technologies installed to end-use customers in Vermont that reduce greenhouse gas emissions from the thermal sector. Clean heat measures shall not include switching from one fossil fuel use to another fossil fuel use. The Commission may adopt a list of acceptable actions that qualify as clean heat measures.

² 30 V.S.A. § 8123(2): “Clean heat credit” means a tradeable, nontangible commodity that represents the amount of greenhouse gas reduction attributable to a clean heat measure. The Commission shall establish a system of management for clean heat credits pursuant to this chapter.

³ 30 V.S.A. § 8127(k)(2): The owner or owners of a clean heat credit are not required to sell the credit.

⁴ 30 V.S.A. § 8123(12).

⁵ 30 V.S.A. §§ 8124(a)(1) and 8122(c).

- Clean heat credits would go to the entity, including customers, that induces, pays for, or incentivizes the clean heat measure.

Clean Heat Credit Ownership Structure, Staff Proposal:

For the purpose of receiving feedback from the Equity Advisory Group and the Technical Advisory Group, Commission staff offer the following proposal on clean heat credit ownership.

Staff proposes distinguishing initial credit ownership based on whether the clean heat measure was installed or delivered, using the following methodology:

- For installed clean heat measures, end-use customers are awarded all clean heat credits.
- For clean heat measures impacting multi-owner properties, the initial credit ownership will be divided amongst the customers by a pre-arranged agreement.
- For delivered measures, ownership would hinge on the question of who initiated the measure:
 - If a customer opts for the delivered measure (e.g., voluntary purchase of renewable natural gas or higher biofuel blends), the customer will initially own the credit;
 - If a fuel dealer initiates the delivery of a delivered CHM of up to 20% biofuel blend, the deliverer owns the credit;
 - If a natural gas utility initiates the delivery of a delivered CHM of up to the amount of renewable natural gas authorized in its alternative regulation plan, the utility owns the credit;
 - If fuel dealers initiate the delivery of a delivered CHM above a 20% biofuel blend, the fuel dealers must first inform the customer and confirm the customer's heating equipment is able to handle the fuel blend and then the deliverer will own the credit.

Staff Considerations:

Commission staff acknowledges that there are multiple reasonable approaches to this decision and has considered, among other things, the following regarding this proposed methodology.

- Customers, installers, and deliverers are the entities at the center of the clean heat standard. Customers may enter into contracts transferring ownership of clean heat credits to the installer or deliverer, a number of whom may also be obligated parties. Customer credit ownership will give customers negotiating power in their contractual agreements with their installer or deliverer, which could result in an exchange of incentives for the credit, likely reducing the cost of the clean heat measure to the customer.
- To ease concerns that customers may be unduly pressured by their installer or deliverer to implement a clean heat measure for credit-creation purposes, the Commission could require installers and deliverers to provide Commission-approved information about the Clean Heat Standard program, alternative technologies and fuels, and information about what programs are available to help pay for measures.

- Awarding proportional credits to every party that supports and/or pays for a clean heat measure: would complicate the initial determination of credit ownership; could create market confusion about ownership; could potentially raise equity concerns; and could complicate subsequent transactions. Allowing credit ownership to originate with the end-use customer is simpler for all parties involved. Note, though, that parties are not prohibited from entering into contracts regarding the ownership of credits, including for an exchange of funds or other incentives or services.

Specific Requested Feedback:

Input is now requested from the Technical and Equity Advisory Groups^{6,7} regarding Staff's proposed methodology to address initial clean heat credit ownership. Staff specifically seeks feedback on the following questions but welcomes all thoughts on this subject.

- Whether a different methodology should be applied to pipeline renewable natural gas deliveries?
- Whether all credits for installed and delivered measures should be awarded directly to customers?
- Should customers first evaluate and give informed consent to a deliverer-initiated use of a delivered clean heat measure, no matter the blend percentage?
- Whether a different methodology should be applied to clean heat credits for early action clean heat measures?

⁶ 30 V.S.A. § 8127(b): The Commission, in consultation with the Technical Advisory Group, shall establish a standard methodology for determining what party or parties shall be the owner of a clean heat credit upon its creation. The owner or owners may transfer those credits to a third party or to an obligated party.

⁷ 30 V.S.A. § 8129(a)(5): providing feedback to the Commission on the impact of the Clean Heat Standard on the experience of Vermonters with low income and moderate income.”

April 17, 2024

Ms. Holly Anderson, Clerk
Vermont Public Utility Commission
112 State Street
Post Office Drawer 20
Montpelier, Vermont 05620-2701

Re: **Case No. 23** – EAG comments on Staff Proposal: Initial Ownership of Clean Heat Credits

Dear Clerk Anderson,

The Equity Advisory Group (EAG) for the Clean Heat Standard (CHS) proceeding (Case No.23) has reviewed the straw proposal created by the Vermont Public Utility Commission (“Commission”) Staff on credit ownership issues (“Staff Proposal: Initial Ownership of Clean Heat Credits”) and wishes to provide feedback on matters to consider as the Commission continues its rulemaking. EAG members urge the Commission to make the process for credit transfers as simple, transparent, and fair as possible for parties involved in clean heat credit generating activities.

EAG members agree with Commission staff that for installed measures, end-use customers should be awarded all clean heat credits. However, the term “customers” should be clarified. In this context, it appears to mean “individual(s) or businesses who *own the building or property* in which the equipment is being installed”. However, the Commission Staff should confirm that this definition matches their intent in the proposal, and this definition should be made as clear as possible in final rules. This will help to avoid ambiguity in circumstances, for example, in which a third party or parties are financing the purchase, a third party is purchasing equipment for a project, or situations with a landlord-tenant relationship in which the tenant is the fuel customer, but the landlord is purchasing or owns installed equipment.

The Commission Staff proposal asserts that “customer credit ownership will give customers negotiating power in their contractual agreements with their installer or deliverer, which could result in an exchange of incentives for the credit, likely reducing the cost of the clean heat measure to the customer.”

However, this statement assumes that customers will have sufficient knowledge of the value of their credits to inform their negotiations. This cannot be presumed based on the information Staff are currently proposing to be provided to credit owners. Individuals and

small business owners will have a significant knowledge imbalance compared to obligated parties seeking to obtain and maximize the value of credits.

In addition to the proposal from Commission Staff that the Commission could require “installers or deliverers to provide Commission-approved information about the Clean Heat Standard program, alternative technologies and fuels, and information about what programs are available to help pay for measures”, EAG members suggest that the Commission consider providing the following information:

- Estimated greenhouse gas emissions reductions generated from installation of measures.
- The number of clean heat credits generated from the measures.
- Information on the monetary value of the credits generated from the measures.
- Estimated energy cost savings generated from installation of the measures.
- Health disclosures related to the installed measures (if any).

In developing these recommendations, EAG members debated the feasibility of additional disclosures, and acknowledge that the Commission will need to assess whether this additional information above is readily available at the time of a measure installation or credit transfer. In particular, the value of credits is expected to fluctuate, and may be unclear at the time of installation. However, if the Commission is serious about empowering customers, it should strive to provide as much information as practically possible to aid customers in their negotiations.

To that end, the Commission should consider what information the Commission itself could make available to consumers and the public as it designs a marketplace. EAG members have also suggested that the Commission explore establishing a permanent ombudsperson position to help customers navigate credit transactions.

EAG members continue to discuss issues of credit ownership for delivered measures. However, the EAG recommend that at a minimum, delivered fuels generating clean heat credits also be accompanied by information disclosures, to the extent practical, including:

- Commission-approved information about the CHS Program.
- Alternative technologies and fuels
- Information about programs available to help pay for measures.
- Estimated greenhouse gas emissions reductions generated from delivered fuels
- The number of clean heat credits generated from the measures.
- Information on the monetary value of the credits generated from the measures.
- Health disclosures related to the delivered fuels (if any).

The EAG sees issues of credit ownership as one of the most important elements of the Clean Heat Standard, with significant equity and affordability implications, and expects to continue to provide feedback to the Commission as the CHS framework is developed.

Sincerely,

A handwritten signature in black ink that reads "Mia Watson". The signature is written in a cursive, flowing style.

Mia Watson, Chair

On behalf of the Clean Heat Standard Equity Advisory Group

STATE OF VERMONT
PUBLIC UTILITY COMMISSION

Case No. 23-2220-RULE

Proceeding to design the potential Clean Heat Standard	
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Order entered: 12/12/2023

ORDER ADDRESSING EARLY ACTION CREDITS

I. INTRODUCTION

On June 30, 2023, the Vermont Public Utility Commission (“Commission”) issued an Order opening this rulemaking proceeding to design the potential Clean Heat Standard. In response to a request for clarity on what documentation and other record keeping would be required to substantiate early action credits pursuant to 30 V.S.A. § 8124(c), the Commission requested comments from stakeholders and members of the public on this topic on September 18, 2023.¹ In today’s Order, the Commission establishes preliminary documentation and record-keeping practices for potential early action credit claims. This Order should guide clean heat measure providers in documenting their work related to the installation and delivery of clean heat measures that have been ongoing since January 1, 2023, and up until the potential implementation of the Clean Heat Standard.

II. PARTICIPANT COMMENTS

The Commission received 11 comments and 11 reply comments giving feedback on early action credit documentation requirements.

General

The Conservation Law Foundation (“CLF”) states that any guidance should be clearly marked with a disclaimer that revisions are likely following analytical work that will form the basis for the program---such as lifecycle emissions, carbon-intensity values, and credit ownership. Thomas Weiss, the Department of Public Service (“Department”), Vermont Gas

¹ 30 V.S.A. § 8124(c): “Early action credits. Beginning on January 1, 2023, clean heat measures that are installed and provide emission reductions are creditable. Upon the establishment of the clean heat credit system, entities may register credits for actions taken starting in 2023.”

Systems, Inc. (“VGS”), and Vermont Electric Cooperative Inc. (“VEC”) each commented on what measures should be considered potentially eligible for early action credits – with Mr. Weiss and the Department supporting just those that are explicitly listed in 30 V.S.A. § 8127(d), and VGS and VEC seeking regulatory certainty of what constitutes an early action measure. Vermont Public Power Supply Authority (“VPPSA”) opined that establishing guidance on early action credits is premature and may set an inappropriate precedent. VGS, the Vermont Fuel Dealers Association (“VFDA”), and the Heating and Cooling Contractors of Vermont (“HCCV”) all raised the importance of customer privacy. VPPSA, Efficiency Vermont, and the Town of Stowe Electric Department (“Stowe Electric”) all agreed that the Technical Advisory Group should be formed expeditiously and provide clarification on the scope of documentation needed.²

Comments Addressing Recordkeeping and Documentation for Early Action Credits

The VFDA, HCCV, and Clean Fuels Alliance America all suggest that the statutorily required information alone should be sufficient to document early action activities.³ These participants also suggest what records should serve to substantiate this information –invoices, work orders, delivery tickets, and customer self-attestations for income level.

The Department suggests a detailed list of information to substantiate all early action measures. The Department acknowledges that the Commission may expand or narrow what is required based on future recommendations by the Technical Advisory Group. The Department also recommends that notice be provided to customers who undertake clean heat measures that their information may be shared with the Department and its contractors for evaluation and verification purposes. The City of Burlington Electric Department and Green Mountain Power Corporation agree with the Department’s recommendations.

The Agency of Natural Resources (“ANR”) provided its own list of information and documentation to require for clean heat measure verification. ANR contends that there should be no difference in the information collected to verify either an early action credit or a credit within

² 30 V.S.A. § 8128(a).

³ Act 18 provides a specific list of information required for general credit registration: “the location of the clean heat measure, whether the customer or tenant has a low or moderate income, the type of property where the clean heat measure was installed or sold, the type of clean heat measure, and any other information as required by the Commission.” 30 V.S.A. § 8127(l)(2).

the implementation period of the program. ANR's list includes items that would inform its data tracking and analysis efforts related to measuring and tracking progress on climate action and the greenhouse gas emissions inventory.

Efficiency Vermont recommends that the current documentation and recordkeeping requirements for verification of the energy efficiency utility ("EEU") and Renewable Energy Standard Tier III programs be used for early action credits.

Stowe Electric recommends a tracking and reporting protocol that matches the system in place for Efficiency Vermont and the Vermont electric distribution utilities for heat pump measures under a joint rebate program. Stowe Electric also suggests reporting the name of the applicable distribution utility ("DU") jurisdiction in the early action credit program. Stowe Electric contends that this would encourage clean heat measure installers to communicate with the DUs and EEUs to take advantage of existing marketing and outreach campaigns.

Mr. Weiss provided a detailed list of information that would be needed to substantiate a clean heat credit. Mr. Weiss acknowledges that there is substantial overlap among the recommendations as well as some complementary suggestions. Mr. Weiss suggests that certain information may be required for all early action measures whereas other required information may be unique to individual categories of measures.

III. DISCUSSION AND CONCLUSION

General

As more is determined about the design of the potential Clean Heat Standard, and more information is developed through this rulemaking process and the work of the Technical Advisory Group, it may be necessary to revisit and revise the documentation and recordkeeping for early action credits.

We provide the following guidance regarding the information that the Commission recommends entities obtain and retain to claim credits for the delivery or installation of eligible clean heat measures listed in 30 V.S.A. § 8127(d).⁴ Additionally, given the broader definition of

⁴ 30 V.S.A. § 8127(d): "List of eligible measures. Eligible clean heat measures delivered to or installed in residential, commercial, and industrial buildings in Vermont shall include: (1) thermal energy efficiency improvements and weatherization; (2) cold-climate air, ground source, and other heat pumps, including district, network, grid, microgrid, and building geothermal systems; (3) heat pump water

“clean heat measure” in statute and referenced in the text guiding early action credits, the Commission leaves it to the discretion of those engaged in such activities to preserve documentation of potential measures beyond the statutory list.⁵

The Commission adopts customer-privacy-related considerations put forth by several participants. Namely, as mentioned by VGS, the VFDA, and HCCV, all personal customer information should be kept secure by the entity that is collecting the information, as well as their agents and contractors. Additionally, as recommended by the Department, a disclosure notification should be provided to customers who undertake clean heat measures that their information may be shared with the Department and its contractors for evaluation and verification purposes.

Today’s Order expressly *does not* address the topics of credit creation, valuation, or ownership. Those topics will be addressed in the future following additional process and input. In the meantime, because the question of credit ownership remains unresolved, we note that Mr. Weiss proposes a helpful and practical suggestion: that documentation of potential clean heat measures generated by the installer/deliverer should be shared with the property owner and retained by the installer/deliverer.

Documentation of Early Action Credits

The Commission must balance the desire to minimize the administrative burden on providers related to clean heat measures with the fact that the success of this program will depend, in part, on regulators’ ability to accurately verify and account for the savings that result from clean heat measures. Therefore, we intend to be broad in our guidance on documentation

heaters; (4) utility-controlled electric water heaters; (5) solar hot water systems; (6) electric appliances providing thermal end uses; (7) advanced wood heating; (8) noncombustion or renewable energy-based district heating services; (9) the supply of sustainably sourced biofuels; (10) the supply of green hydrogen; (11) the replacement of a manufactured home with a high efficiency manufactured home and weatherization or other efficiency or electrification measures in manufactured homes; and (12) line extensions that connect facilities with thermal loads to the grid.”

⁵ 30 V.S.A. § 8123(3): “‘Clean heat measure’ means fuel delivered and technologies installed to end-use customers in Vermont that reduce greenhouse gas emissions from the thermal sector. Clean heat measures shall not include switching from one fossil fuel use to another fossil fuel use. The Commission may adopt a list of acceptable actions that qualify as clean heat measures.”

and recordkeeping of early action measures to increase the chance that early action measures will generate credits if the Clean Heat Standard program goes into effect.

Given this aim, the Commission has primarily adopted the documentation suggested by the Department, which is the entity responsible for verification of clean heat measures and resulting credits if the Clean Heat Standard goes into effect, and which has decades of experience performing a similar function in the energy efficiency context and for energy transformation projects under the Renewable Energy Standard.⁶ The inclusion of additional documentation is intended to increase specificity, and therefore the likelihood that a potential early action measure will become creditable.

Retaining documentation of the following information does not guarantee eligibility of an action for credit. Even so, we believe collecting as much of this information as is practicable will maximize the likelihood of a measure being awarded credit.

Accordingly, based on the feedback received from stakeholders, we recommend that the following information be obtained and retained to substantiate potential early action measures.

General Information

1. Deliverer/Installer Information
 - a. Deliverer/Installer business name
 - b. Deliverer/Installer contact name
 - c. Deliverer/Installer full business address
 - d. Deliverer/Installer full business email address
 - e. Deliverer/Installer business phone number
2. Recipient Information
 - a. Address where measure delivered/installed**
 - b. Primary contact name (customer and business, if applicable)**
 - c. Primary contact address (if different from installation/delivery address)**
 - d. Primary contact email address**

⁶ Documentation suggested by the Department is in bold text.

- e. **Primary contact phone number**
 - f. **Account type (residential or commercial)**
 - g. Income indicator (self-attestation) – Low⁷ / Moderate⁸ / Neither
3. Clean Heat Measure Information
- a. Date of installation/delivery
 - b. **Description of Clean Heat Measure delivered/installed**
 - i. **Explanation of the scope of work that may yield Clean Heat Credits**
4. Baseline
- a. Equipment
 - i. **Description of baseline equipment/condition**
 - 1. Make/model (if applicable)
 - 2. Fuel type (if applicable)
 - 3. **Include any relevant equipment efficiencies and data establishing historical fossil fuel use (if applicable)**
 - 4. **Whether equipment will be removed or will remain**
 - b. Weatherization
 - i. Energy audit report, initial blower test, if applicable
 - ii. Baseline state of insulation and weatherization in the building(s)
5. Costs / Incentives
- a. **Total cost of measure documented through invoices for purchase of any equipment, materials, and installation costs (assuming a physical**

⁷ 30 V.S.A. § 8123(5) “‘Customer with low income’ means a customer with a household income of up to 60 percent of the area or statewide median income, whichever is greater, as published annually by the U.S. Department of Housing and Urban Development or a customer who qualifies for a government-sponsored, low income energy subsidy.” Per 2023 data from the U.S. Department of Housing and Urban Development, Vermont statewide 4-person family median income is \$101,600 (<https://www.housingdata.org/documents/purchase-price-and-rent-affordability.pdf>).

⁸ 30 V.S.A. § 8123(6) “‘Customer with moderate income’ means a customer with a household income between 60 percent and 120 percent of the area or statewide median income, whichever is greater, as published annually by the U.S. Department of Housing and Urban Development.”

measure has been installed at the location). Invoices should include quantities, make/models, and costs.

- b. Indicate cost share for the measure, if applicable (e.g., what the recipient paid, what costs were borne by the installer/deliverer, etc.)**
- c. Incentive program(s), amount(s) and incentive source (e.g., energy efficiency utilities, distribution utilities, Clean Energy Development Fund, or other)**

6. Other

- a. Any other information and supporting documentation that will help an evaluator understand where assumptions came from or other unique aspects of the operations of the measures at the location**

Measure-specific Information


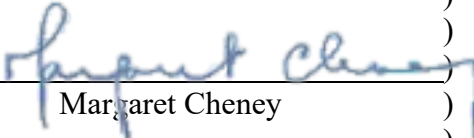
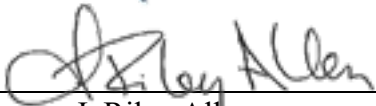
- 7. For heat pumps (all types), water heaters, solar hot water, electrical appliances providing thermal end uses and advanced wood heating, the following should also be provided:**
 - a. Photos of nameplates with model numbers of any equipment being replaced and of any new equipment after it has been installed**
 - b. Inspection notes or certifications provided related to the system**
- 8. For biofuels and green hydrogen deliveries, the following should also be provided:**
 - a. Documentation of ongoing deliveries of biofuels, detailing the dates and amounts (gallons) delivered and the blend provided. In the case of blended biofuels, additional documentation that certifies the actual blend percentage purchased/delivered.**
 - b. If no equipment is being replaced, then photos of nameplates with model numbers of existing equipment should be documented.**
- 9. For line extensions, the following should also be provided:**
 - a. Explanation of the load shape: when the use of the measure will occur throughout the day, week, year to be relatable to ISO-NE and**

Vermont system peaks

b. Description of any electric load shifting, if applicable

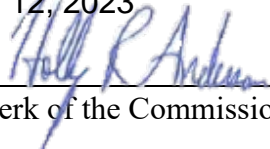
SO ORDERED.

Dated at Montpelier, Vermont, this 12th day of December, 2023.

 _____)) PUBLIC UTILITY
Anthony Z. Roisman))
_____)) COMMISSION
 _____)) OF VERMONT
Margaret Cheney))
_____))
 _____))
J. Riley Allen))

OFFICE OF THE CLERK

Filed: December 12, 2023

Attest: 

 Clerk of the Commission

Notice to Readers: This decision is subject to revision of technical errors. Readers are requested to notify the Clerk of the Commission (by e-mail, telephone, or in writing) of any apparent errors, in order that any necessary corrections may be made. (E-mail address: puc.clerk@vermont.gov)

PUC Case No. 23-2220-RULE - SERVICE LIST

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VERMONT CLEAN HEAT CREDIT

Customer Information & Agreement Form

Credits may be associated with the product or service described in this document and recognized by the State of Vermont under Act 18 of 2023.

Clean Heat Credit Qualifying Energy Product Delivered Delivery Date Gallons/Tons

Clean Heat Credit Qualifying Appliance Installed Installation Date Manufacturer/Model

Name of Heating Fuel/Service Company Name of Technician/Delivery Driver

Company Address City/Town State Zip Code

Company Contact Phone E-mail

Customer Type: () Residential () Commercial Customer Name/Business

Customer Address City/Town State Zip Code

Customer Phone Customer E-mail

I hereby grant, convey, transfer, and/or assign all ownership, right, title, interest in such Clean Heat Credits associated with the installation or delivery of the above energy product, appliance, or service described in this document to the Heating Fuel/Service Company identified on this form free of any liens, claims, or security interests.

Customer Name Customer Signature Date

- I attest my household income is less than 60% state median income, according to the guidelines on the other side of this form.
- I attest my household income is less than 120% state median income, according to the guidelines on the other side of this form.
- I decline to state my income.

The information below is needed to satisfy the requirements set forth in Act 18 and the Clean Heat Standard.

Household Size	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person
60% of State Median Income (SMI)	\$34,525	\$45,149	\$55,772	\$66,396	\$77,019	\$87,642
Household Size	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person
120% of State Median Income (SMI)	\$69,050	\$90,298	\$111,544	\$132,792	\$154,038	\$175,284

The Public Utility Commission recommends that the following information be obtained and retained by heating service and heating fuel businesses to substantiate potential clean heat credit early action measures.

Deliverer/Installer Information

- Deliverer/Installer business name
- Deliverer/Installer contact name
- Deliverer/Installer full business address
- Deliverer/Installer full business email address
- Deliverer/Installer business phone number

Customer Information

- Address where measure was delivered/installed
- Primary contact name (customer and business, if applicable)
- Primary contact address (if different from installation/delivery address)
- Primary contact email address
- Primary contact phone number
- Account type (residential or commercial)

Clean Heat Measure Information

- Date of installation/delivery
- Description of Clean Heat Measure delivered/installed with an explanation of the scope of work that may yield Clean Heat Credits

Baseline

- **Equipment**
 - Description of baseline equipment/condition
 - * Make/model (if applicable)
 - * Fuel type (if applicable)
 - * Include any relevant equipment efficiencies and data establishing historical fossil fuel use (if applicable)
 - * Whether equipment will be removed or will remain
- **Weatherization Measures**
 - Energy audit report, initial blower test, if applicable
 - Baseline state of insulation and weatherization in the building(s)

Costs/Incentives

- Total cost of measure documented through invoices for purchase of any equipment, materials, and installation costs (assuming a physical measure has been installed at the location). Invoices should include quantities, make/models, and costs.
- Indicate cost share for the measure, if applicable (e.g., what the recipient paid, what costs were borne by the installer/deliverer, etc.)
- Other consumer incentives provided for energy, equipment or service (if known)

Measure-specific Information

- For heat pumps (all types), water heaters, solar hot water, electrical appliances providing thermal end uses and advanced wood heating, the following should also be provided:
 - * Photos of nameplates with model numbers of any equipment being replaced and of any new equipment after it has been installed
 - * Inspection notes or certifications provided related to the system
- For Renewable Propane, BioHeat, Biodiesel, Renewable Diesel, and wood pellets, the following should also be provided:
 - * Documentation of ongoing deliveries, detailing the dates and amounts (gallons) delivered and the blend provided. In the case of blended biofuels, additional documentation that certifies the actual blend percentage purchased/delivered.
 - * If no equipment is being replaced, then photos of nameplates with model numbers of existing equipment should be documented.

Any other information and supporting documentation that will help an evaluator understand where assumptions came from or other unique aspects of the operations of the measures at the location.