



P-12 Schools - Clean Green Schools Initiative

PON 4924 Modification

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NYSERDA

Meeting Procedures

- **Participation for Members of the Public:**

- Members of the public are muted upon entry.
- Questions and comments may be submitted in writing through the Q&A feature at any time during the event.
- Chat is disabled.
- Today's presentation will be posted to - nyserdera.ny.gov/P-12-Clean-Green-Schools

Overview of Clean Green Schools Initiative

- **Budget:**
 - \$160 M
 - \$100M of Clean Water, Clean Air and Green Jobs Environmental Bond Act funding
 - \$60M of CEF/RGGI funding
- **Program Goal:**
 - The goal of the program is to help under-resourced **public** schools decarbonize their building portfolio and improve indoor air quality (IAQ) across their buildings.
- **Eligibility:**
 - **Track I:** All public school districts across NYS that are designated as High-Needs by the New York State Education Department or have at least one building which is located in a disadvantaged community.
 - **Track II:** All public school districts across NYS that are designated as High-Needs by the New York State Education Department or school buildings which are located in a disadvantaged community.
 - Track I and Track II provide support for **existing buildings**, not new construction projects.

PON Modifications

- **PON modifications include, but are not limited to:**
 - An expanded school eligibility list.
 - Higher funding caps in Track I and Track II.
 - A second round of Track II (e.g. implementation/construction funding).

Program Structure

- This program provides funding in two tracks to support a school's pathway towards decarbonization.
 - **Track I Planning: Open Enrollment (accepting apps until 12/30/25)**
 - Provides funding for services which will help schools evaluate, plan for and facilitate energy reduction projects, clean energy projects and indoor air quality projects.
 - **Track II Installation: Competitive (proposals due 6/6/24)**
 - Provides funding to implement construction projects which will help schools decarbonize their buildings.
 - **Clean Energy Educational and Professional Development Opportunities:**
 - NYSERDA will provide funding to support a range of workforce development and student educational activities for P-12 students that explore, support or promote decarbonization efforts in their schools and communities. This is an optional service in Track I and Track II.
- Participation in Track I is not a requirement to participate in Track II, but Applicants must have an energy study or equivalent analysis completed at the time of a Track II application.

Track I Planning: Eligible Projects

- **Eligible services include, but are not limited to:**
 - Engineering & Architecture Services
 - Energy Benchmarking
 - Energy Studies
 - Energy Efficiency and Clean Heating and Cooling Design Services
 - Energy Master Planning and Decarbonization Roadmaps
 - Clean Transportation Studies
 - Indoor Air Quality Evaluation and Management
 - On-Site Energy Manager
 - District level or across districts
 - Services Associated with Clean Energy Projects
 - Grant Writer
 - Fiscal Advisor
 - Clean Energy Educational and Professional Development Activities
 - *This must be paired with an above bullet and is ineligible as a standalone project.*

Track I Planning: Funding

Track I NYSEDA Caps		District Annual Energy Spend Less than \$500,000	District Annual Energy Spend \$500,000 - \$2,000,000	District Annual Energy Spend More than \$2,000,000
Maximum District Caps		\$650,000	\$950,000	\$1,250,000
	Metering (hardware costs only) ¹	not to exceed 10% of Track I services		
	Fiscal Advisor and/or Grant Writer ¹	not to exceed \$30,000	not to exceed \$60,000	not to exceed \$90,000
	Clean Energy Educational and Professional Development Activities Cap ¹	\$10,000 per building, not to exceed \$50,000 per district		

1. The cap is included in the Track I NYSEDA District Caps above.

- NYSEDA’s funding ranges from \$650,000 - \$1,250,000 per district depending on the district’s annual energy spend.
- School districts are not required to contribute funding to a Track I project unless the project cost exceeds the cap in the table above.

Track I Planning: Application Requirements

- **A complete application package includes the following:**
 - Track I Program Application
 - Scope of Work
 - Budget
- **Applicants may be either the school or an authorized representative of the school.**
- **Applicants may include one or more Track I services in their Scope of Work.**
- **Applicants may submit one application on behalf of multiple buildings within a district.**
- **Template documents are available on the Clean Green Schools Initiative documents and resources website.**

Track II Installation: Eligible Projects

- **Clean Heating and Cooling Projects:**
 - Ground Source Heat Pump
 - Air Source Heat Pump
 - Variable Refrigerant Flow System

- **Capital Projects to Move Towards Decarbonization:**
 - Comprehensive retrofits that impact energy consumption and overall building load
 - Electrification of building systems (e.g., kitchen equipment & domestic hot water heaters)
 - Building electrification readiness projects:
 - High performance building envelope (e.g., air sealing, insulation, window film)
 - Heating/cooling projects
 - Conversion of distribution systems (e.g., steam to hot water) to support potential future electrification

Track II Installation: Eligible Projects Continued

- The following supporting upgrades/efforts are eligible when completed in combination with any eligible activities shown above:
 - Building ventilation system and filtration system capital projects
 - Resiliency measures
 - Building Automation Systems
 - Energy storage systems
 - Renewable energy technologies
 - Clean electricity purchase with emphasis on the use of community solar or “Green” energy service provider
 - Window replacement
 - Upgrading existing electrical infrastructure (e.g., electrical panel upgrades & equipment service infrastructure
 - Lighting upgrades
- *All Track II projects must have an energy study or equivalent analysis completed at the time of application.*
- *For projects that include the installation of refrigerant containing equipment (such as chillers and heat pumps):*
 - *The feasibility of utilizing equipment that contains a natural or other refrigerant with a global warming potential (GWP) of less than 10 shall be studied and installed if deemed feasible.*

Ineligible Projects:

- System conversion to natural gas
- Full system replacement to new fossil fuel-based system

Track II Installation: Funding

- **One Building:**
 - \$500,000 - \$5,000,000 for eligible project types
 - Up to \$30,000 for Clean Energy Educational and Professional Development Activities
 - Total max funding per school building is \$5,030,000
- **Multiple Buildings:**
 - \$500,000 - \$10,000,000 for eligible project types
 - Up to \$100,000 for Clean Energy Educational and Professional Development Activities
 - Total max funding per multiple buildings is \$10,100,000
- **Additional Incentives:**
 - Additional incentives may be available through your local utility.

*Maximum funding awarded from NYSERDA may not exceed 100% of the project cost. Additional funded sources are encouraged such as State Aid and your local utility.

Track II Installation: Proposal Requirements

- **A complete Track II Proposal package includes the following:**
 - Completion of the series of questions presented in NYSERDA's online portal submission platform
 - School Authorization Form, if applicable (Attachment B)
 - Track II Proposal Template (Attachment D)
 - Track II Building Impacts Table (Attachment E)
 - Track II Milestone Payment Schedule (Attachment F)
 - Energy study or equivalent analysis used to select the Track II project components
- **The Proposer may be either the school or an authorized representative of the school.**
- **First Round: Proposals are due on **6/6/24** by 3:00 pm EST.**
- **Read the PON and ask questions!**

Track II Installation: Proposal Evaluation

- **Proposals will be evaluated by a Scoring Committee based on their overall responsiveness and specifically based on the Evaluation Criteria below, which are listed in order of importance:**
 - Project Impact (65 points)
 - Clarity of Budget (15 points)
 - Project Team and Stakeholder Commitment (10 points)
 - Project Implementation and Schedule (10 points)
- **Projects will be evaluated in two separate categories: Clean Heating and Cooling projects and Capital Projects to Move Towards Decarbonization. If a project includes measures from both categories, it will be evaluated under the Clean Heating and Cooling project category.**
 - Evaluation and scoring of each proposal will ultimately be determined in comparison with and relative to the other proposals submitted in each category.

Track II Installation: Proposal Evaluation

- **Project Impact (65 points):**
 - Project includes installation of clean heating and cooling system(s) that will supply a portion of the schools heating and cooling load (Clean Heating and Cooling category) OR
 - Project includes installation of Capital Projects to Move Towards Decarbonization.
 - Reduces schools greenhouse gas emissions related to energy consumption (proposals will be grouped in to tiers).
 - Stage of proposed project.
 - Appropriate ventilation and filtration as a result of the decarbonization project.
 - Resiliency components of proposed project.
 - Expanded use of the school(s) to support the community.

Track II Installation: Proposal Evaluation

- **Clarity of Budget (15 points)**
 - Budget completed and appears reasonable.
 - Project leverages additional funding from federal funding, utility incentives or grant opportunities.
 - Funding secured covering the entire proposed cost of the project, net the NYSERDA funding requested.

Track II Installation: Proposal Evaluation

- **Project Team and Stakeholder Commitment (10 points)**
 - Project Team includes relevant parties with the necessary background and experience to ensure project success and likelihood of installation of project as proposed.
 - Preference will be given to projects implemented by contractors that are participating in New York State Department of Labor (NYS DOL) recognized pre-apprenticeship programs or NYS DOL registered apprenticeship programs.

Track II Installation: Proposal Evaluation

- **Project Implementation and Schedule (10 points)**
 - Includes a detailed description for the proposed school building upgrades and provides dates for the Project Stage and Schedule (see Attachment D - Section Ib and Section III). The dates included in the anticipated schedule demonstrate a realistic understanding of how the proposed project will proceed through implementation.

Clean Energy Educational and Professional Development Opportunities

- **NYSERDA will provide funding to support a range of workforce development and student educational activities for P-12 students that explore, support or promote decarbonization efforts in their schools and communities.**
- **The Educational and Professional Development Activities Pathway document, which is located on the Clean and Green Schools Initiative documents and resources website:**
 - Should be consulted for assistance in designing these activities
 - Includes existing programs, tools, and resources
- **Eligible activity costs include, but are not limited to:**
 - Curriculum development, program/license fees, software subscription fees, project supplies/tools/equipment, field trips, promotional material, speakers, teacher stipends, internship wages, textbooks, signage, clean energy toolkits, registration/entrance fees (conferences, camps, workshops), space rental, consultants/trainers fees, professional development fees, food, travel and lodging.

Clean Energy Educational and Professional Development Opportunities: Additional Funding

- **Track I Planning:**
 - Per Building – Up to \$10,000
 - Per District – Up to \$50,000
- **Track II Installation :**
 - One Building – Up to \$30,000
 - Multiple Buildings – Up to \$100,000

Important Dates and Resources

- **Track II Proposals Due:**
 - Thursday (6/6/24) by 3:00 pm EST
- **Clean Green Schools Initiative Website:**
 - Visit the Clean Green Schools Initiative website to see the most current list of Program resources, specific to eligibility, template documents, guidance documents and more.
 - [Link - nyscrda.ny.gov/P-12-Clean-Green-Schools](https://nyscrda.ny.gov/P-12-Clean-Green-Schools)
- **Contact Information:**
 - E-mail Hannah.Morgan@nyscrda.ny.gov

NYS BOCES

On-Site Energy Manager Services

(RFP 5206)

- **This RFP allows BOCES to provide their own On-Site Energy Manager offering to their districts, working in conjunction with NYSERDA.**
- **NYSERDA believes BOCES can leverage their existing relationships with schools to effectively and efficiently provide OSEM services.**
- **Funding is provided by NYSERDA in accordance with applicable NYSERDA Program:**
 - Under-resourced schools are funded at PON 4924 – Clean Green Schools Initiative funding levels (up to 100% cost share).
 - Districts not eligible for PON 4924 are funded at PON 3701 – Commercial On-site Energy Manager funding levels (up to 75% cost share).
 - BOCES administrative costs related to implementing the offering are also eligible for NYSERDA cost share.
- **Email AdamOSEM@nyserda.ny.gov for more information.**

Questions

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