



**Workforce Development Training for Energy Efficiency
Program Opportunity Notice (PON) 1816
Up to \$910,500 EEPS and \$300,000 GJGNY Funds Available**

OPEN ENROLLMENT SOLICITATION

PART I - CERTIFICATION INCENTIVES FOR INDIVIDUALS

Applications accepted through May 31, 2012 by 5:00PM Eastern Time *

(* Applications may be accepted on a first-come, first-served basis until funds run out, and no later than 5:00 PM Eastern Time on the above due date.

NYSERDA funding is available for individuals and sponsoring organizations that help individuals obtain nationally recognized certifications relevant to energy efficiency skills and competencies needed to support the Energy Efficiency Portfolio Standard (EEPS). Funds are also available under the Green Jobs Green New York (GJGNY) Program to support certification and contractor accreditation for individuals and organizations not eligible for funding under the EEPS. NYSERDA will provide cost-shared reimbursement upon successful completion of specific nationally recognized certifications. Individuals must demonstrate that they have achieved certification and have met all eligibility requirements. Reimbursable expenses may include certification-related expenses, such as written examination fees, field exam fees, certification preparation course fees, and contractor accreditation fees.

Application Submission: Completed and signed application reimbursement forms and all required documentation should be submitted directly to NYSERDA at the address below. The completed application must be postmarked no later than May 31, 2012, and should be submitted directly to NYSERDA via email to Kelli Herndon at kmh@nyserda.org, or via U.S. mail to:

**Kelli Herndon, Workforce Development TPA
NYS Energy Research and Development Authority
17 Columbia Circle
Albany, NY 12203-6399**

All Program questions or general questions concerning workforce training, should be directed to: Kelli Herndon at kmh@nyserda.org. All questions must be submitted in written form. If you have contractual questions concerning this solicitation, contact Venice Forbes (518) 862-1090, ext. 3507 or vwf@nyserda.org.

(* Late, incomplete, or unsigned applications will be returned. Faxed or e-mailed applications will not be accepted. Applications will not be accepted at any other NYSERDA location other than the address above. If changes are made to this solicitation, notification will be posted on NYSERDA's website at www.nyserda.org



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NYSERDA WORKFORCE DEVELOPMENT PROGRAM

TRAINING GUIDANCE AND APPLICATION DOCUMENT

PART I - CERTIFICATION INCENTIVES FOR INDIVIDUALS

NYSERDA funding is available for individuals and sponsoring organizations that help individuals obtain nationally recognized certifications relevant to energy efficiency skills and competencies needed to support the Energy Efficiency Portfolio Standard (EEPS). Funds are also available under the Green Jobs Green New York (GJGNY) Program to support certification and contractor accreditation for individuals and organizations not eligible for funding under the EEPS. NYSERDA will provide cost-shared reimbursement upon successful completion of specific nationally recognized certifications. Individuals must demonstrate that they have achieved certification and have met all eligibility requirements. Reimbursable expenses may include certification-related expenses, such as written examination fees, field exam fees, certification preparation course fees, and contractor accreditation fees.

ELIGIBILITY REQUIREMENTS

NYSERDA funding is available to support training across New York State per the eligibility requirements outlined below. All classroom and field training must be held within New York State, and if applying under terms of the EEPS, the classroom and field training must be held within the System Benefits Charge (SBC) service territory¹. Under no circumstances will NYSERDA fund student travel expenses. Participants that attend online training must demonstrate eligibility under EEPS or GJGNY based on place of residence and utility service territory, regardless of the location of the online provider. Individuals meeting the following eligibility requirements may receive NYSERDA incentives as described in this guidance document:

- 1) **Eligibility Requirements under EEPS.**² Individuals paying into the System Benefits Charge (SBC) through the SBC utilities (e.g., have home or office mailing address in SBC territory), and contractors, energy service companies, and others who can demonstrate active participation in a NYSERDA or utility program funded by the SBC or EEPS are eligible for funding under this program. No funding will be allowed for training associated with implementation of the Weatherization Assistance Program (WAP) because the Division of Housing and Community Renewal (DHCR) has received funding under the American Recovery and Reinvestment Act to implement the expansion of the WAP. All classroom or field training must be held within the System Benefits Charge (SBC) territory, or in the case of online training, the participant must pay into the SBC, or demonstrate active participation in a NYSERDA or utility program funded by the SBC/EEPS.

¹ The SBC territory includes the following utility service areas: *Central Hudson, Con Edison, New York State Electric and Gas, National Grid, Orange and Rockland, and Rochester Gas and Electric.*

² Further information regarding NYSERDA's EEPS Workforce Development Operating Plan is available at: <http://www.getenergysmart.org/Files/GreenJobs/WFDOperatingPlan.pdf>

- 2) **Eligibility Requirements under GJGNY.**³ Individuals across New York State, including Long Island residents within the LIPA service territory, residents in NYPA service territory, and residents in other municipalities not participating in the SBC may apply. All classroom or field training must be held within New York State, or in the case of online training, the applicant must demonstrate that participants have a home or office address in New York.

AVAILABLE FUNDING

NYSERDA allocated \$910,500 funds to be paid as incentives to applicants who meet the eligibility requirements under EEPS, and successfully complete approved nationally recognized certifications. NYSERDA seeks to award these funds on a first-come, first-served basis, or until funds are depleted, whichever occurs first.

NYSERDA has allocated an additional \$300,000 funds to be paid as incentives to applicants that meet the eligibility requirements under GJGNY, and successfully complete approved nationally recognized certifications. NYSERDA seeks to award these funds on a first-come, first-served basis, or until funds are depleted, whichever occurs first. Applicants may not receive funds under this offer if NYSERDA has sponsored the training attended by the applicant under a separate agreement with the training entity. Applicants may use other funds to assist with cost of tuition.

Information regarding the updated balance of available funds will be posted on the NYSERDA website, www.GetEnergySmart.org.

PROGRAM REQUIREMENTS

Background

Since the inception of the Home Performance with ENERGY STAR[®] Program and the Multifamily Performance Program, NYSERDA has supported individuals and participating contractors and partners with reimbursement for costs associated with training tuition, Building Performance Institute (BPI) certifications, and Company BPI accreditation. This support continues through the NYSERDA programs and is supplemented with incentives under this solicitation as outlined below.

CEEBS Training Incentives

Building science training to prepare students for BPI certification is offered through the Center for Energy Efficiency and Building Science (CEEBS), headquartered at Hudson Valley Community College. CEEBS is funded in large part by NYSERDA and uses curriculum licensed by NYSERDA to deliver building science training across the State. CEEBS will continue to automatically process reimbursement to eligible students for building science training courses offered at the CEEBS locations.

Please note: Training participants completing the Multifamily Building Analyst and Multifamily Building Operator training and not yet signed on as participating Multifamily Performance Program partners are eligible to receive 50% reimbursement for training fees, and 75% reimbursement of written and field exam fees by completing the **BPI Certification and Contractor Accreditation Reimbursement Form** and submitting to NYSERDA along with other required documentation.

³ Further information regarding NYSERDA's GJGNY Workforce Development Operating Plan is available at: <http://www.nyserda.org/GreenNY/>

Participating partners in NYSERDA's Multifamily Performance Program are eligible for an additional 25% reimbursement for fees associated with training and written and field exams. For more information regarding available CEEBS training, visit: <http://www.getenergysmart.com/GreenJobs/Efficiency.aspx>
BPI Certification Incentives (within CEEBS network)

After achieving BPI certification, eligible participants can apply for NYSERDA incentives to offset the cost of required written and field exams. To be eligible for NYSERDA funding, it is required that the training be completed and the certification be awarded between November 30, 2009 and May 31, 2012. Eligible participants who receive a new BPI certification may receive 75% reimbursement of written and field exam fees by submitting the **BPI Certification and Contractor Accreditation Reimbursement Form** along with other required documentation. Eligible participants who receive a recertification (certification renewal) may receive 75% reimbursement for only those fees associated with the field exam. An additional 25% reimbursement is provided for staff of participating Home Performance contractors for both new and certification renewals.

BPI Certification and Training Incentives (outside the CEEBS network)

Building science training to prepare students for BPI certification is also offered through private training entities. Eligible participants attending building science training in locations other than the CEEBS learning centers may apply for 50% reimbursement of costs associated with certification upon successful award of an eligible certification. Eligible participants must submit to NYSERDA a completed **BPI Certification and Contractor Accreditation Reimbursement Form** and required documentation including a receipt for tuition paid for the certification preparation course, fees associated with the written and field exams, and application fee. To be eligible for NYSERDA funding, the training must be completed and the certification must be awarded between November 30, 2009 and May 31, 2012.

Certification and Certification Preparation Training Incentives

After achieving an approved nationally recognized certification (other than BPI)⁴, participants may apply for 50% reimbursement of costs associated with certification and certification preparation training up to a maximum of \$200 in NYSERDA funding. Eligible participants must submit a completed **Certification and Prep Course Reimbursement Form** to NYSERDA along with required documentation including tuition paid for certification preparation course fees, exam, and application fees. To be eligible for NYSERDA funding, the training must be completed and the certification must be awarded between November 30, 2009 and May 31, 2012, and the Form must be submitted no later than May 31, 2012.

A list of approved certifications relevant to energy efficiency skills and competencies is provided on the reimbursement form. All training must be held within an SBC service territory as defined above. Certifications from the Association of Energy Engineers (AEE), United States Green Building Council (USGBC), International Facility Management Association (IFMA), American Society of Heating, Refrigerating, and Air-conditioning Engineers (ASHRAE), Northwest Energy Efficiency Council Building Operator Certification (BOC), National Council on Qualifications for the Lighting Professions (NCQLP), North American Technician Excellence (NATE), and other relevant certifications for residential and commercial energy efficiency will be considered.

⁴ A list of preapproved certifications is included on **Certification and Prep Course Reimbursement Form**. Individuals may request reimbursement for certifications *not listed* on this form, but must provide a description of the certification, the name and contact person with the accreditation body, and explain how this certification relates of the goals of the EEPS. NYSERDA will review all requests for reimbursement and will determine if the applicant meets eligibility requirements.

Contractor Accreditation

Incentives are available to reimburse certain costs associated with Company BPI Accreditation. To facilitate incentive processing, eligible contractors are encouraged to submit a completed **BPI Certification and Contractor Accreditation Reimbursement Form** to NYSERDA along with required documentation as outlined on this Form no later than May 31, 2012. It is anticipated that BPI will continue to provide a list of Contractor Accreditations directly to NYSERDA to verify eligibility for reimbursement of costs associated with new and renewal Company BPI Accreditation.

APPLICATION REQUIREMENTS AND DUE DATE

Interested individuals must submit either the **BPI Certification and Contractor Accreditation Reimbursement Form** or the **Certification and Prep Course Reimbursement Form** and all required documentation directly to NYSERDA. The completed application must be postmarked no later than May 31, 2012, and should be submitted directly to NYSERDA via email to Kelli Herndon at kmh@nyserda.org, or via U.S. mail to:

**Kelli Herndon, Workforce Development TPA
NYS Energy Research and Development Authority
17 Columbia Circle
Albany, NY 12203-6399**

If you have technical questions concerning workforce training, contact Kelli Herndon at kmh@nyserda.org. All questions must be submitted in written form. If you have contractual questions concerning this solicitation, contact Venice Forbes (518) 862-1090, ext. 3507 or vwf@nyserda.org.

PROGRAM REIMBURSEMENT AND APPLICATION FORMS

BPI Certification and Contractor Accreditation Reimbursement Form - Incentive application form for tuition reimbursement for certification preparation classes, certification exam fees, and accreditation fees incurred for obtaining BPI certification or accreditation.

Certification and Prep Course Reimbursement Form - Incentive application form for tuition reimbursement for certification preparation classes and certification exam fees incurred for obtaining nationally recognized certifications relevant to energy efficiency skills and competencies necessary to support the EEPS.



BPI Certification and Contractor Accreditation Reimbursement Form

Reimburse Candidate*
 Reimburse Company**

Reimbursement for BPI Certification and Contractor Accreditation:

Candidates seeking reimbursement for Certification(s) or Contractor Accreditation shall submit the following documents to NYSERDA, ATTN: Kelli Herndon, 17 Columbia Circle, Albany, NY 12203.

Please include the following documents with your reimbursement form. Place a checkmark (✓) next to each document to indicate that you have enclosed it with your application. NYSERDA cannot process the reimbursement without this information. Please allow 3-4 weeks for processing.

- BPI Certification & Contractor Accreditation Reimbursement Form
- Proof of certification or accreditation
- Proof of payment for exam(s) or accreditation fees (if applicable)
- A copy of your recent utility bill (to verify your residence in an SBC-utility service territory), OR demonstration of active participation in a NYSERDA or utility program funded by SBC or EEPS
- Invoice for training (only for training held outside CEEBS network, reimbursement not to exceed \$200)

If you have any questions completing this form, please contact:
 Kelli Herndon at kmh@nyserda.org or 518-862-1090 ext 3392.

Candidate Information			
Full Name:			
Address:			
City		State:	
Telephone:	()		
E-Mail			
SS #*			
*Required if the Candidate is requesting reimbursement			
<input type="checkbox"/> EMPLOYED BY A PARTICIPATING BPI ACCREDITED HPw/ES CONTRACTOR: (please list name below)			
Company Information			
Legal Business Name:			
Business Address:			
City		State:	
Telephone:	()		
E-Mail			
Business Website:			
Tax ID**			

****Required if the Company is requesting reimbursement**

BPI Certification and Contractor Accreditation Reimbursement Form

For reimbursement of eligible tuition and certification exam fees, please indicate the certification(s) for which you are requesting reimbursement. You may only be reimbursed for one written and one field exam per certification.

Certification(s)	Date of Certification	Eligible Training Tuition * Reimbursement not to exceed \$200	Amount Paid for Certification Exams	
			Written	Field
Building Analyst Professional		\$	\$	\$
Envelope Professional		\$	\$	\$
Heating Professional		\$	\$	\$
A/C or Heat Pump Professional		\$	\$	\$
Manufactured Housing Professional		\$	\$	\$
Multifamily Building Analyst		\$	\$	\$
Multifamily Energy Efficient Building Operations		\$	\$	\$
Multifamily Hydronic Heating System Designer		\$	\$	\$
Multifamily Advanced Heating Plan Technician		\$	\$	\$
Air Sealing Installer		\$	\$	\$
Insulation Installer		\$	\$	\$
TOTAL		\$	\$	\$

(*) NYSERDA will cost-share up to 50% of tuition costs for training held outside the CEEBS network; NYSERDA share not to exceed \$200 per training.

For reimbursement of Contractor Accreditation fees, please indicate the name of the organization(s) for which you are requesting reimbursement.

Accreditation	Date of Accreditation	Cost
		\$
		\$
TOTAL		\$

I certify that all information in this application is true and correct and I am authorized to request this reimbursement.

Signature:	Date:
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NYSERDA USE ONLY	
NYSERDA has verified that this individual passed the written and field examinations and is certified.	
Signature:	Date:
CANDIDATE ID:	Renewal Date:



Certification and Prep Course Reimbursement Form

(Eligible National Certification Other Than BPI)

Reimbursement to Candidate* Reimbursement to Company**

Instructions: ALL of the information below must be submitted only after successful completion of a certification exam:

- Documentation of Certification Received
- Payment receipt for the Certification Examination and Preparation Class Fees (if applicable)
- A copy of your utility bill (to verify your residence in an SBC-utility service territory) OR demonstration of active participation in a NYSERDA or utility program funded by SBC or EEPS.

Candidate Information			
Full Name:			
Address:			
City		State:	ZIP:
Telephone:	()	County:	
E-Mail			
SS #*			

*Required if the Candidate is requesting reimbursement

Company Information			
Legal Business Name:			
Business Address:			
City		State:	ZIP:
Telephone:	()	County:	
E-Mail			
Business Website:			
Tax ID**			

**Required if the Company is requesting reimbursement

Please indicate the certification(s) for which you are requesting reimbursement. You may only be reimbursed for one written and one field exam per certification (as applicable).

Certification(s)	Date of Certification	Amount Paid for Cert Exams	Prep-Course Amount	Please place a ✓ in the appropriate column	
				New Cert	Renewal
AEE					
Certified Energy Manager (CEM)		\$	\$		
Fast Track Preparatory Course for Energy Managers (CEM)		\$	\$		
Certified Energy Auditor (CEA)		\$	\$		
Energy Manager in Training (EMIT)		\$	\$		
Certified Building Commissioning Professional (CBCP)		\$	\$		
Certified Sustainable Development Professional (CSDP)		\$	\$		
Certified Carbon Reduction Manager (CRM)		\$	\$		
Certified Building Energy Professional (BEP)		\$	\$		
Certified M&V Professional (CMVB)		\$	\$		
Certified Energy Procurement Professional (CEP)		\$	\$		
Certified Lighting Efficiency Professional (CLEP)		\$	\$		
Certified Power Quality Professional (CPQP)		\$	\$		
Distributed Generation Certified Professional (DGCP)		\$	\$		
Certified Green Building Engineer (GBE)		\$	\$		
Certified Geoexchange Designer (CGD)		\$	\$		
Certified Renewable Energy Professional (REP)		\$	\$		
Existing Building Commissioning Professional (BESA)		\$	\$		
Certified Cogeneration Professional (CCP)		\$	\$		
Certified Demand Side Management Professionals (CDSM)		\$	\$		

Certified Indoor Air Quality Professional (CIAQP)		\$	\$		
Certified Geoexchange Designer In Training (CGDIT)		\$	\$		
Certified Testing, Adjusting Balancing Professional (CTAB)		\$	\$		
Certified Indoor Air Quality Technician (CIAQT)		\$	\$		
ASHRAE					
Healthcare Facility Design Professional (HFDP)		\$	\$		
High Performance Building Design Professional (HPBDP)		\$	\$		
Operations and Performance Management Professional		\$	\$		
Commissioning Process Management Professional (CPMP)		\$	\$		
Building Energy Modeling Professional (BEMP)		\$	\$		
NATE					
Installation		\$	\$		
Service		\$	\$		
Senior Technician		\$	\$		
Other NATE Credential		\$	\$		
NCQLP					
Lighting Designer		\$	\$		
Advanced Lighting Design		\$	\$		
USGBC					
LEED Green Associate		\$	\$		
LEED AP (BD+C, ID+C, Homes, O+M or ND)		\$	\$		

To request funding for certifications not listed above, please attach a description of the certification, the name and contact person with the accreditation Organization. Also, explain how this certification relates to the goals of the EEPS. Name of Certification	Date of Certification	Amount Paid for Cert Exams	Prep-Course Amount	Please place a ✓ in the appropriate column	
				New Cert	Renewal
		\$	\$		
Contact at the accrediting organization:		Contact Phone:			
Relationship to EEPS goals:					

Seeking Reimbursement for:

- Certification Course Preparation Fee \$ _____
- Certification Examination Fee \$ _____
- Certification Application Fee \$ _____
- Total Fees: \$ _____
- NYSERDA Reimbursement Request (50%) \$ _____ (Maximum NYSERDA incentive of \$200)

The completed Certification Reimbursement Package must be postmarked no later than May 31, 2012, and submitted directly to:

Kelli Herndon, Workforce Development TPA
NYS Energy Research and Development Authority
17 Columbia Circle, Albany, NY 12203-6399

I certify that all information in this application is true and correct and I am authorized to request this reimbursement.

Signature:	Date:
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(November 2010)