GREEN JOBS GREEN NEW YORK: WORKFORCE DEVELOPMENT OPERATING PLAN

INTRODUCTION
The Green Jobs Green New York (GJ/GNY) Workforce Development Operating Plan (WDOP) outlines the New York State Energy Research and Development Authority’s (NYSERDA) role and responsibilities in implementing the Workforce Development components of the Green Jobs Green New York Act of 2009. Workforce Development activities are a critical component of GJ/GNY. The ability of the program to meet its goals of energy retrofits depends in large part on the ability of the workforce development activities to commence immediately. Therefore, the Workforce Development component of the Operating Plan is being submitted in advance of the Comprehensive Operating Plan.

On October 9, 2009, Governor David Paterson signed into law the Green Jobs Green New York Act of 2009 (A.8901/S.5888 and chapter amendment A.9031/S.6032). The Act directs NYSERDA to establish and administer the program within six months of the effective date.

For workforce development and training initiatives, the legislation directs NYSERDA to:

- establish standards for energy audits based on building type and other relevant considerations;
- enter into contracts to provide employment and training services to support the Green Jobs Green New York Program.

Further, the GJ/GNY Program is designed to create job opportunities, including opportunities for new entrants into the state’s workforce, focusing on the long-term unemployed and displaced workers and new workforce entrants.

WORKFORCE WORKING GROUP
On November 18, 2009, NYSERDA established a Workforce Working Group\(^1\) to help identify workforce development and training needs associated with the Green Jobs Green New York

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\(^1\) The Working Group included representatives from the NYS Department of Labor; Tony Joseph and Amy Savoie; Consortium for Worker Education, Rebecca Lurie; Ulster County BOCES, Virginia Carrig; Laborers International Union of North America, Myles Lennon; Earth Kind Energy, Ron Kamen; Green Homes America, Dick Kornbluth; Workforce Development Institute, Paul Shatsoff; Peter Young Housing-Industries-Treatment, Jackie Gentile and Bill Baffe; 32BJ Thomas Shortman Training Program, James Barry; Center for Working Families, Chloe Tribich; Building Performance Institute, Inc., Larry Zarker; Sustainable South Bronx, Miquela Craytor; Oilheat Associates, Inc., John Levey; Small Business Development Corp., William Brigham; CUNY BPL, Mike Bobker; Hudson Valley Community College-
Act. The Workforce Working group was asked to identify the workforce training needs necessary to implement the GJ/GNY program, taking into consideration the specific requirements of the Act and workforce development and training activities already being implemented across the state.

The Working Group held 5 meetings, and then the working group was broken into five Subgroups to further discuss and make recommendations in five categories as follows:

- Equipment and Training Infrastructure Needs
- Certification
- Apprenticeships/Internships/On the Job Training (OJT)
- Curriculum
- Non-Constructions Jobs

On January 4th, 2010, the full Workforce Working Group convened for the day to discuss the recommendations of each subgroup. The WDOP presents the recommendations of all subgroups\(^2\), and addresses other immediate training needs in support of the GJ/GNY Act. Solar Thermal and Oil Heat Efficiency training recommendations are also included in the curriculum development plan since these are two new technology areas covered in the GJ/NY Act that are not sufficiently funded through the System Benefits Charge (SBC) and the Energy Efficiency Portfolio Standard (EEPS). SBC and EEPS programs have focused primarily on technologies that address electric energy savings. Finally, funding support is also being recommended for a clean energy training conference and other technology transfer activities related to workforce development.

**GJ/GNY WORKFORCE DEVELOPMENT STRATEGY**

The success of the legislative goals of the GJ/GNY Act will require widespread implementation of energy efficiency and clean energy measures requiring an expanded workforce, composed of experienced contractors, displaced workers, unemployed, and new workforce entrants. Over the past several years, NYSERDA has administered funds to support training programs that have reached over 6,500 workers, and will reach an additional 6,200 workers through an expanded effort funded under the Energy Efficiency Portfolio Standard. This achievement has established a workforce training infrastructure that includes 13 Center for Energy Efficiency and Building Science (CEEBS) locations, 32 renewable energy learning centers, and many other training partners with the capability to help support the demands of this legislation. The numbers of workers already trained, however, must be tripled in order to support the GJ/GNY goals over the next five years. To achieve these goals, NYSERDA will engage existing contractors to immediately deliver services, leverage existing contractor relationships by structuring direct-entry apprenticeship and internship incentives as a method to help defray staffing costs, build

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\(^2\) The recommendations for the non-construction jobs subgroup were related to curriculum development needs, and therefore are included along with all other recommendations from the curriculum subgroup.

*CEEBS, Paula Hayes; NYS Builders Association, Phil Larocque; Community Environmental Center, Claudia Edwards; Green City Workforce, Lisbeth Sheperd; Apollo Alliance, Jeff Jones; and IBEW 236, Rick Cataldo.*
increased training infrastructure through the expansion of existing training centers, furnish new equipment, and restructure field testing and certification examination protocol to help ramp up the number of participants to be trained over the next year. The following model outlines key areas of coordination between NYSERDA, NYS DOL, and other workforce development partners needed to deploy a comprehensive workforce development strategy.

**Green Jobs Green New York**
**Workforce Development Framework**

**Labor Supply**
- Individual
- One-Stop Career Center
- DSS Employment Services
- Skills Assessment Services

**Job Match Services**
- Placement Complete?
  - No
    - Career Planning & Training
  - Yes

**Workforce Training**
- Referral to public funded programs for Entry-level Job / Basic Skills Training
  - NYSDOL’s Emerging & Transitional Worker ($15M)
  - OTDA’s Green Jobs ($7M) and Career Pathways Program
- Referral to programs for Energy Efficiency Occupational Skills Training
  - Certification - BPI
  - CEEBS Network
  - Trade/Labor- based training and workforce coordination
  - Other training partners or agencies
- Infrastructure
  - Accreditation / Certification
  - Curriculum and Schools

**Labor Demand**
- Energy Efficiency Jobs
- Weatherization Assistance Program
- Green Jobs Green NY
- NYSERDA Programs

- Installation Helper (Entry-level)
- Installer
- Crew Supervisor
- Building Auditor
- Prod. Coordinator

**Equipment and Training Infrastructure Needs**

**OBJECTIVES**
NYSERDA workforce development efforts funded under GJ/GNY will be aligned with program strategies that promote the widespread implementation of energy efficiency and clean energy measures and will help provide meaningful employment opportunities for displaced workers, long-term unemployed and new workforce entrants. Workforce training initiatives must assist people through the process of recruitment and training to certification. Subsequent steps include placement into a position within a business while ensuring that work completed by this newly trained individual is conducted in a manner that provides embedded quality assurance and sustainable market development to gain the most efficiency from the installation of efficiency measures. Equipment, training/simulation houses, and hands on approaches with diagnostics are needed to master skills, pass certification exams, and enable businesses to employ newly trained workers that must deliver a quality work product.
RECOMMENDATIONS

Outreach to Past Participants
Identify, during training, those students who intend to achieve certification. Survey, identify, and market additional opportunities for certification under GJ/GNY Act to past training program participants. Encourage those students that previously dropped out of the program, or decided not to complete the certification exam, to proceed with certification leading toward new employment. Recruit these potential participants to hands-on workshops. Budget: $25,000.

Create Workshops
Create workshops series and other curriculum to support GJ/GNY needs. Budget: $1,000,000.

- Short review/practice workshops providing technicians the opportunity to get hands-on practice with the tools necessary to pass the certification exam, addressing: blower door skills, combustion testing, using smoke sticks, carbon monoxide detection and combustion appliance zone testing, solar thermal installation skills, etc.
- Hands-on skills development workshops/CEUs for new and experienced technicians: advanced insulation installation, leak identification and remediation techniques, gas leak detection and repair, training on ENERGY STAR appliances, window and door repair/replacement techniques, lighting, basic water conservation, ducts and duct blasters, heat pumps, small business development, software and computer skills, and solar panel installer, including roofing issues.
- Small commercial energy audit workshops and field work to facilitate hands-on practice with energy calculations and other tools used by energy consultants

Equipment Incentives
Equipment incentive and equipment lending programs so certification candidates and contractors have the necessary tools to take the field exams and start businesses. All technology areas (oil and gas heating, solar thermal, and other building science training) will be supported. Budget: $600,000.

Establish Lab Houses for Field-testing and Certification
Build and use lab houses and look for opportunities to use municipal buildings and existing houses (compensating owners) for training and certification exams. Budget: $800,000.

Expand Field Examination Capacity
Work with training centers to schedule the field certification exam during the training to provide a more seamless path from training to certification. Provide funds to develop more BPI field exam proctors, Every BPI affiliate in New York should have multiple field proctors. Budget: $150,000.
CERTIFICATIONS AND COMPANY ACCREDITATION

OBJECTIVES
NYSERDA has supported the development of standards and related certifications in the home performance and multifamily sectors, and seeks to develop a standard for the commercial sector and in other areas where a certification standard does not currently exist. The residential program funded under GJ/GNY will require work to be completed by accredited contractors, whereas the small commercial and non-profit sector will be served by competitively selected contractors with professional experience in this sector. The objective of the Workforce Development effort is to help workers in completing the required certifications, and to support contracting firms and other businesses that will likely employ experienced and certified workers. NYSERDA has been a strong supporter of the Building Performance Institute (BPI), the Institute for Sustainable Power (ISP), and the North American Board of Certified Energy Practitioners (NABCEP) to help assure quality auditing and installation practices. The long term objective is to leverage the development and use of national credentials to help ensure minimum performance standards and quality assurance for all work completed under the GJ/GNY Act.

RECOMMENDATIONS
BPI Accreditation
A BPI Accredited contractor is committed to educate consumers on a whole house comprehensive approach even when a comprehensive package of services is not accepted. BPI Accreditation helps ensure that the accredited contractor has all the tools and techniques necessary to impress upon the customer the value and importance of the offer, while still allowing the flexibility to perform a limited scope of work if that is accepted and appropriate.

BPI Accredited companies agree to employ BPI Certified Professionals in sufficient quantity and designation at each business location to ensure ability to conduct testing to BPI Standards, review work scopes, and sign off on certificates of completion. A minimum of one, full time Building Analyst (BA) and one, full time specialty designation (e.g. Heating Professional), according to the work to be performed, is required. The BA and specialty designation can be held by the same individual.

1) In order to meet the demand for Home Performance contractors, NYSERDA should require BPI accredited companies and organizations seeking BPI accreditation to work with individuals that have not yet attained BPI certification, so long as the value of the subcontracted work does not exceed 20 percent of the volume of business of the BPI Accredited organization. All residential work covered by BPI standards that is subcontracted to the accredited organization by a non-accredited general contractor must conform to the terms of the Accreditation Agreement.

2) NYSERDA should continue to allow contractors to obtain company accreditation through a staged process. BPI recognizes that companies seeking accreditation may require additional help in meeting the requirements of the Accreditation Agreement while
continuing to provide traditional business services to their customers. In the first 12 months of the accreditation period, the BPI Accredited contractor must complete a minimum of 25% of its total residential jobs in conformance with BPI Standards. Upon renewal and during the second 12 months of accreditation, the BPI Accredited contractor must complete a minimum of 50% of its total residential jobs in conformance with BPI Standards. After 24 months, upon renewal, the BPI Accredited contractor must agree to conform to BPI Standards on all residential projects.

Curriculum Recognition and Accreditation
NYSERDA should engage in discussion with ISP to serve in capacity to recognize and accredit training curriculum as compliant with BPI certification requirements. Although BPI has provided this function in the past, BPI seeks assistance in establishing an independent party to serve in this role so as to better comply with ANSI/ISO17024 standards. **Budget: $50,000.**

Installer and Heating Certifications
In specialty building science areas where NYSERDA has not identified a certification as a requirement for performing GJ/GNY work, NYSERDA should issue a request for qualifications for third-party certifications recognized by employers and either in conformance with ANSI/ISO 17024 quality standards and must be compliant no later than December 2011. New installer certifications should include hands-on and written assessments, and should verify proficiency in installer-level work to be performed relevant to the Green Jobs Program. Prerequisites shall include a background in building science and auditing fundamentals, occupational health and safety, and required relevant health and safety certifications.

NYSERDA should seek to fund the development of two specialty heating certifications, one for specialty in oil-fired forced air furnace installation, and one for a specialty in gas-fired forced air furnace installation. The gas forced air furnace installation certification must include ACCA Quality Installation standards. Both new specialty certifications must include building science, and combustion health and safety components. These new certifications will incorporate a written exam in building science and health and safety concepts, and include a field test component as already required for the general Heating Specialist Certification. NYSERDA should seek to establish reciprocity between BPI and other nationally recognized certifications such as already coordinated with the North American Technician Excellence (NATE) certification, and to specifically include reciprocity with the National Oil-heat Research Alliance (NORA) Silver and Gold certifications as replacement for the written test currently required for the general Heating Specialist Certification. **Budget: $100,000.**

Commercial Audit Certification
NYSERDA has supported the development of standards and related certifications in the home performance and multifamily sectors, and seeks to develop a standard for the commercial sector. To the extent that the GJ/GNY legislative goal is to further expand the number of green jobs in New York State, it becomes more critical to establish a national performance standard including the skills and knowledge requirements necessary to conduct a small commercial energy audit. New and incumbent workers could then be trained and evaluated against this standard in an effort to develop a sustainable pool of quality providers in the growing green
economy. The long term goal is to leverage the development and use of a national credential to help ensure minimum performance standards and quality assurance. NYSERDA should issue an RFP to create an energy audit certification standard for auditing small commercial and not-for-profit buildings. The certification should be in conformance with ANSI/ISO 17024 standards and should be administered by an independent third party credentialing organization. **Budget: $300,000**

**Support New NABCEP Solar Thermal Programs**

NYSERDA recommends support for the development of NABCEP's: 1) Entry Level Program for Solar Thermal Careers and; 2) Solar Thermal Technical Sales Program. With this funding, NABCEP will develop exams and study materials based upon a task analyses that will be done for the Entry Level and Technical Sales Programs. These task analyses will define a general set of knowledge, skills and abilities typically required for solar thermal careers, and help to define the requirements for the assessment and credentialing of practitioners. They will also help to establish the requirements for accrediting training and educational programs and in developing criteria. **Budget: $200,000.**

**APPRENTICESHIPS**

**OBJECTIVES**

The Workforce Development effort must advance the skills of new workers, provide job-related experience, and help connect new workers to the marketplace. On-the-Job Training (OJT), apprenticeships, and internships will be deployed to rapidly increase the number of skilled workers in the energy efficiency field. Success can be achieved by effectively addressing three challenges: 1) Advancing skills of new/vulnerable workers with training in a work-like setting without undermining pay structures for skilled workers and the budget constraints of employers; 2) Rapidly increasing the quantity of skilled workers in energy efficiency; and 3) Connecting trainees to existing jobs.

**RECOMMENDATIONS**

**NYS Registered Apprenticeship and Certified Construction Training Programs**

Enhance existing standards for NYS Registered Apprenticeship Programs to include weatherization, energy efficiency and green building certification principles. Journeyman-level workers with these skills would meet qualifications as certified workers for GJ/GNY business. Such programs should be identified as affiliated with GJ/GNY as “qualified” training programs. However, sponsoring a NYS Registered Apprenticeship Program should not be a requirement for contractor bidding on work being financed by GJ/GNY.

Enhance existing standards for certified building trades training programs to include weatherization, energy efficiency and green building certification principles. Individuals who attain these skills would meet qualifications as certified workers for GJ/GNY businesses. Examples of these training programs include those administered by the Home Builders Institute (educational arm of the National Association of Home Builders). Such programs should be identified as “GJ/GNY affiliated” certified training programs. **Budget: $800,000.**
Green Jobs Work Readiness Programs
Recruit entry-level workers for GJ/GNY contractors from graduates of programs that meet training standards for green collar jobs including, but not limited to, the following state funded programs: Career Pathways; Pathways out of Poverty; Emerging and Transitional Worker Training; and Disconnected Youth Training. These training programs should be recognized as “GJ/GNY affiliated” green jobs work readiness training programs. **Budget: $300,000.**

On the Job Training (OJT) and Internships
Fund OJT and internships to support businesses supported through the Act to hire graduates of Green Jobs Work Readiness programs. This will serve as an incentive to help graduates obtain work experience. It is also likely that a percentage of the OJT/Internship hires would become full-time unsubsidized employees of the business. Additionally, commercial energy audits will receive financing through GJ/GNY and businesses will be required to ramp up staff quickly. OJT is an important mechanism for the type of work involved in a commercial energy audit, where field work cannot be replaced by classroom training or certification completion alone. **Budget: $1,425,000.**

Direct Entry into NYS Registered Apprenticeship Programs
Individuals who complete training from a GJ/GNY affiliated green jobs work readiness program and who have worked on a GJ/GNY financed job, should be deemed eligible for “direct entry” into a NYS Registered Apprenticeship Program. Incentives should be made available to sponsors of apprenticeship programs for direct entry hiring, where the incentive payment is based on attaining time-phased milestones. **Budget: $200,000.**

Business, Community and Labor Intermediary
Establish regional intermediaries to work with businesses, community based organizations, labor organizations and training providers to assure that training programs offered under GJ/GNY address contractor needs, and that graduates of GJ/GNY affiliated training programs are actively recruited. This effort will be coordinated with other program implementation efforts. **Budget: $200,000.**

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3 All contractors must meet measurable and objective standards of quality and professionalism. Community groups or some other entity might offer innovative strategies to recruit or “aggregate” projects in a particular area or neighborhood whose homeowners wish to have a qualified contractor assigned to them. This aggregation will benefit contractors by allowing for a more predictable workload and potential economies of scale. In order for a contractor to successfully bid on or “win” a portion of these aggregated projects, qualified contractors should demonstrate how they meet community benefit parameters set by the program (e.g., a commitment to hire a certain proportion of workers from the community). Complying with community benefit parameters will not be requirements of NYSERDA’s program. Rather, qualified contractors who wish to secure aggregated projects will be evaluated against one another based upon their commitment to local hiring and/or other community benefit parameters established by Community groups.
Worker/Job Clearinghouse
NYSERDA shall coordinate with NYS DOL to establish a mechanism to feed a clearinghouse with information on trainees, graduates and jobs. The development of a worker/job clearinghouse will help to effectively connect labor demand with labor supply. The NYS DOL already has funding to support the development of this clearinghouse.

Evaluation
View the use of the intermediary and the OJT dollars as a pilot project and have a protocol for regular evaluation. These evaluations should weigh the intermediary, the training and the internships against their benefit to the contractors, to the unemployed/emerging workers, the rehiring workers and to the communities from where GJ/GNY is investing. Assure that evaluations examine overall performance of GJ/GNY and its multiple goals.

Curriculum Development

Objectives
To support a comprehensive approach to energy efficiency in the small commercial and non-profit sectors, the Workforce Development effort must support development of new curriculum to build industry skills for a growing number of workers supporting the small commercial sector. To support the “whole house approach” in the residential sector, existing curriculum must be updated to meet the needs of GJ/GNY Act.

Recommendations
Training Curricula Inventory
Create an inventory of existing curricula to better understand how New York State’s current training system addresses key worker competencies relevant to the GJ/GNY Program, and to better coordinate existing programs and identify new curricula needs. The inventory should evaluate curricula based on the following characteristics and identify specifically how each supports the Program: prerequisites; languages; geographical area; length of course; target populations; proficiencies and skills covered; equipment used; related job titles; related curricula: certificates awarded; tests administered; ability to enable contractors, constituency-based organizations and/or NYSERDA to meet the GJ/GNY Act’s requirements (i.e. local hiring in ‘target communities,’ M/WBE capacity-building etc.). NYSERDA should meet with SUNY and the NYS DOL to discuss the Labor Market Intelligence grant and its ramifications for developing a curricula inventory, and NYSERDA should solicit proposals to further develop the curriculum evaluation criteria and the inventory. This should include a provision for updating and maintaining the curriculum. Budget: $150,000.

Needs Assessment
Complete a needs assessment to identify what specific skill gaps persist, job categories needed, and which areas training curricula must address. This needs assessment should take the form of a contractor survey. The survey should include questions on OJT, skills desired, and
gaps in training capacity. NYSERDA should coordinate with DHCR to begin a preliminary contractor needs assessment through Weatherization sub-grantees, and solicit proposals to develop the needs assessment survey building on any preliminary information from DHCR/WAP sub-grantee coordination. **Budget: $125,000.**

**Develop Small Commercial Energy Audit Training**
New training is needed to develop skills, knowledge, and awareness of new workers in small commercial and non-profit energy auditing. NYSERDA has defined a “standard” for small commercial energy audits, and will need to increase auditing capacity in this sector. NYSERDA should develop a training program developed specifically for small commercial energy auditing, and have the training be an essential part of an individual (or a company) becoming qualified to conduct audits. This will enable NYSERDA to expand the auditing capacity through training, and will lead toward the longer term objective to implement a certification in small commercial energy audit which is needed to further ensure quality assurance of services offered in this market sector. **Budget: $300,000.**

**Oil Heat Efficiency Training**
Workforce training and development activities targeting heating system efficiency should focus on proper specification, quality installation, and maintenance of oil heat based systems in both the residential and commercial sectors. **Budget: $300,000.**

**Develop Solar Thermal Training and ISP Accreditation**
NYSERDA recommends support for the development of solar thermal training and train-the-trainer courses; code official training; integration of solar thermal training into energy efficiency curricula; training materials and equipment for solar thermal; and the application for ISP Accreditation. NYSERDA will expand the network of solar thermal training providers, with the goal of achieving ISP Accreditation of Programs and Instructors **Budget: $300,000.**

**Work Readiness Skills Courses and Prerequisites**
Designate training programs to administer crucial soft and foundational skill instruction. Green Jobs Work Readiness Organizations should cover general workplace skills, eco-literacy and provide instruction in the following areas:

- **Construction:** Basic Construction Skills, Tool Identification and Use, Construction Math, OSHA 10-hour Construction Safety, Certified Lead Renovator Asbestos Awareness, Hazard Communication, Mold/Indoor Air Quality Awareness, and
- **Homeowner/Community Outreach:** Community Organizing, Documentation Protocols, Sales, Office Administration, and
- **Auditing:** Basic Building Construction Knowledge, Basic Safety Skills, Aptitude for “Hands-on” Learning (coordination/dexterity), Computer Knowledge (Familiarity with Windows and Basic Keyboarding Skills, Math Skills at Basic Algebra Level, Calculator Knowledge to Perform Basic Math Functions (addition/subtraction/multiplication/division), Application of a Multitude of Research Information, Written and Verbal Problem Solving Skills, Decision Making Skills, Team Work/Team Building Skills. **Budget: $250,000.**
**Update Existing Curriculum**
NYSERDA should continue to work with CEEBS, BPI, and other training entities to examine the existing residential auditing curricula and other training to be administered through CEEBS and other training entities on an ongoing basis, identify areas in need of improvement, and update curricula as required. **Budget: $200,000.**

**Homeowner/Community Outreach Curriculum**
NYSERDA should issue a solicitation for proposals for a standardized curriculum covering homeowner/community outreach strategies. **Budget: $150,000.**

**Clean Energy National Conference and Workshops for Trainers**
The third national conference on *New Ideas in Educating a Workforce in Renewable Energy and Energy Efficiency* was held in Albany NY, on November 2009, building upon the success of the two previous conferences. NYSERDA was the primary sponsor, with substantial funding also provided by the U.S. Department of Energy and the NYS Department of Labor. Over 500 people from all over the U.S. and several foreign countries attended two days of sessions and a pre-conference day of technical workshops. The conference focused on instructional strategies, curricula development, job forecasts, career pathways, hands-on training, state and federal initiatives, partnerships, and credentialing programs; all topics that are valuable to implementing clean energy training and job creation programs. **Budget: $125,000.**

**Contractor Exchange Conferences**
NYSERDA recommends funding three conferences for clean energy contractors to exchange information, resources, and specific experiences in the clean energy field. **Budget: $150,000 (3)**

**Train-the Trainer and Trainer Evaluation**
NYSERDA should evaluate the efficacy of existing training programs and their trainers. Such an evaluation should specifically consider the extent to which pedagogical approach and subject matter proficiency affect the quality of training. Such an evaluation should look at both the results of trainees on certification exams and employment, and include a one-page electronic evaluation form completed by trainees. This effort will be coordinated along with other evaluation efforts.
## BUDGET

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Note: Solicitations will be issued as soon as possible upon funding approval.