

Workforce Training - Building Operations and Maintenance Program (PON 5357)

Informational Webinar July 20, 2023 - Davetta Thacher, Sr. Project Manager



NYSERDA

PON 5357: Building Operations and Maintenance “BOM” Training Program



Overview*

- NYSERDA funds training initiatives for projects that equip building operators with the necessary skills to improve the energy performance of their buildings.

Program Details*:

- Focus is on education and skills development that go beyond conventional classroom training.
- Projects can be shaped to meet the training needs of the building owners and operators.
- Proposals must be for buildings or groups of buildings, including partnerships between businesses with common training needs, with annual energy expenditures of \$1 million or more.
- Facilities must be New York State electricity customers that pay into the System Benefits Charge (SBC)/Clean Energy Fund (CEF).

** Same as former PON*

Updated Building O&M Training Program

PON 5357

- PON 3715 - the former Building Operations & Maintenance (O&M) Training Program - retired May 2023 after 15 due dates.
- [PON 5357](#) is now open enrollment, application-based.
- Primary program goals have stayed the same.

What's New?

Application Process

- Applications accepted on a rolling basis depending on funding availability until 12/31/2025.
- NYSERDA will review and evaluate applications monthly.
- NYSERDA intends to inform applicants of the results of the application evaluation before the end of the month following their submission.
- SOW Template provided.

Funding

- Maximum NYSERDA funding amount per project increased from \$400,000 to \$500,000.
- Program budget increased to \$11.5M.

Energy Reporting

- Program now includes an option for energy data to be provided via data release authorization forms.

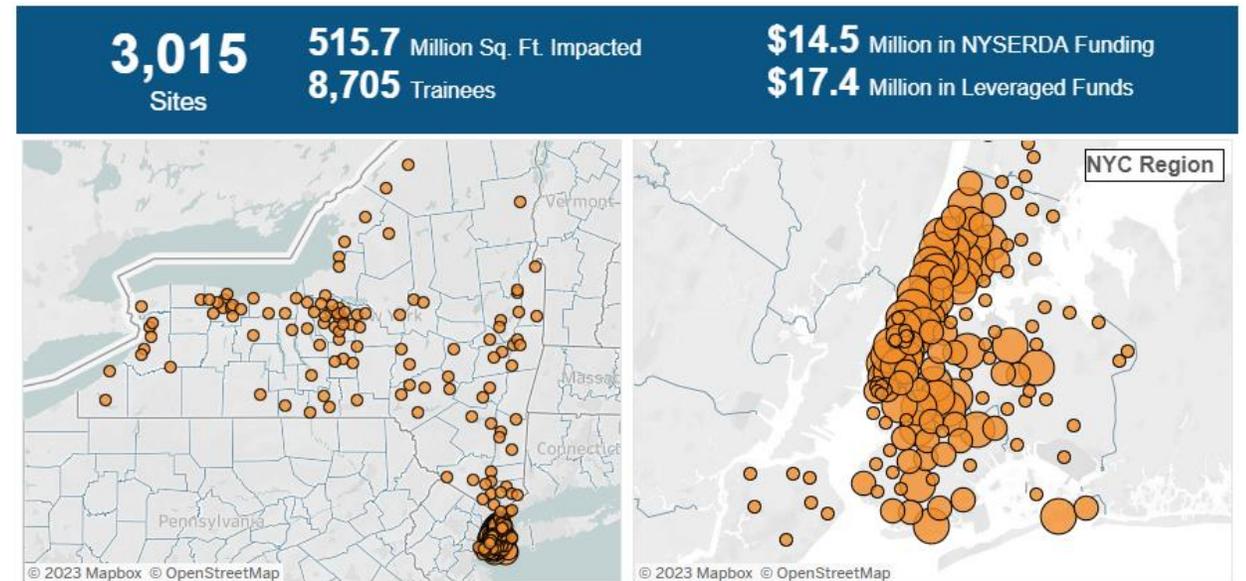
BOM Program Training Goals

- To **reduce energy use** and associated **carbon emissions**
- To save building operators and owners money by **developing and strengthening the skills of operations and maintenance (O&M) staff** and managers across the state so that they can optimize building energy performance
- To equip building O&M workers with the **skills to operate increasingly energy-efficient, grid-flexible, and electrified building systems** (including heat pumps)
- To reduce equipment downtimes, increase occupant comfort, reduce occupant complaints and tenant turnover, increase numbers of staff with national certifications, and offer greater opportunities for employee retention, promotion, and career advancement.
- To advance building O&M workers beyond classroom training and create:
 - Talent development strategy
 - Corporate culture
 - On-site training framework
 - Training tools

Eligibility Requirements

- Facilities must be New York State electricity customers that pay into the System Benefits Charge (SBC)/Clean Energy Fund (CEF)
- Proposals must be for training activities connected with specific buildings or portfolios/campuses of buildings
- Minimum total annual energy expenditures of \$1 million or more (all fuels and uses) for impacted buildings

* Training programs that do not partner with buildings should see [PON 3981](#) Energy Efficiency & Clean Technology Training



[Locations of NYSEERDA Building O&M Training projects funded to date](#)

Funding & Cost Share Requirements

\$11.5 Million* in NYSERDA Funding Available

Cost Share Requirements:

- NYSERDA will provide funding of up to 70% with a cap of **\$500,000*** per proposal.
- Cost share may include cash or in-kind services.
- NYSERDA will provide funding of up to 90% when 75% or more of the buildings are within in a [Disadvantaged Community](#), with a cap of **\$500,000*** per proposal
- Qualifying union-led projects or NYS pre-apprenticeship programs require 10% of cost share.

Examples of eligible cost share include:

- The proposer/facility's employees' wages while working on project activities
- The proposer/facility's employees' wages during training hours
- Equipment that will be used exclusively for training purposes
- Training fees offset by a third party

*Change from PON 3715

Targeted O&M Occupations for Training



Energy/sustainability managers
Facility managers & coordinators
Operating and stationary engineers
Technicians
Repair people
Maintenance workers
Mechanics & supervisors
Electricians
Plumbers
HVAC technicians
Procurement staff

Eligible Activities

- Proposals should be aimed at continuously advancing the skills of new and/or existing building O&M workers at specific buildings.
- Training should be for identified skills gaps for which training is not currently available within the proposing facilities or readily available in the market.
- Eligible training initiatives can be equipment-based or O&M-based.
- **Important that training is replicable and sustainable.**

Eligible Activities:

- On-site training laboratories
- Curriculum development or revision
- Career pathways training
- Coaching and mentorship
- NYS-registered Apprenticeships
- Training trainers within the buildings
- Partnerships with manufacturers
- Planning for training replicability and sustainability

Application Evaluation

Strong Applications will:

- Use the Statement of Work Template and clearly define the **project plan**.
- Clearly identify connection for how the proposed training strategy will **address the identified skills gaps**.
- Effectively leverage **existing resources**.
- Show ways that the training will be **replicable and sustainable**.

PLEASE – only include written material once

PON5357 Attachment B - Statement of Work Template

Instructions:
This Statement of Work (SOW) Template contains both required and optional tasks. Unformatted text should be included in the Applicant's SOW. Text in *italics* is meant to be instructional and requires applicant response. Once addressed, text in *italics* and these instructions should be deleted from the document to be submitted to NYSERDA. Applicants are required to use this as a template when crafting their Statements of Work.

STATEMENT OF WORK

Company Name
Project Director Name
Street Address
City, State Zip Code
Email/Phone/Fax

PROJECT DESCRIPTION AND TRAINING OBJECTIVES
The objectives to be accomplished under this Statement of Work ("Agreement") with Company Name, hereafter known as the "Contractor," are the following:

Give a brief description of the project and briefly discuss your project goals/objectives, the identified talent needs or skills gaps, how your project will address them, how many total individuals will participate in training, and how many buildings will be impacted. This section should not extend beyond page 1.

[Applicant response here]

DEFINITIONS

Disadvantaged Communities - If Applicable to Your Project
The Climate Leadership and Community Protection Act (CLCPA) requires state agencies, authorities, and entities to direct funding in a manner designed to achieve a goal for disadvantaged communities to receive forty percent of overall benefits of spending on clean energy and energy efficiency programs. Information on the criteria for the disadvantaged communities definition and a map identifying areas throughout the state that meet the criteria can be found on NYSERDA's website: [Disadvantaged Communities - NYSERDA](#)

TASK 1 - PARTNERSHIPS/SUBCONTRACTS - REQUIRED of all projects with subcontractors
The Contractor shall enter into Subcontract(s) with the following organizations to achieve the objectives of this project.

If the training provider will hold the contract with NYSERDA, then the facility that employs the trainees would be the subcontractor, and vice versa. If the project includes other subcontractors on

PROJECT APPLICATION - ATTACHMENT A - PON 5357
Workforce Training:
Building Operations and Maintenance

NEW YORK STATE | NYSERDA

TRAINING PARTNER INFORMATION

Training Partner Name
Address City State Zip
Contact Person Title
Phone Number Email Address

FACILITY INFORMATION

Facility Name
Address City State Zip
Contact Person Title
Phone Number Email Address
Number of O&M Employees to be Trained

FACILITY INFORMATION TABLE

Attach an Excel spreadsheet which includes the below information when you submit the completed application. Data must be provided for all buildings whose operations and maintenance employees will participate in the training project. These buildings MUST pay into the SBC/CEF.

Building Name	Street Address	City	Zip Code	Disadvantaged Community	Sector	Floor Area (ft ²)	Total Annual Energy Cost (\$)	Total O&M Staff at Building (F)
				Pick One	Pick One			

What percent of the total buildings are located in a Disadvantaged Community? _____

Page 1 of 3

Application Evaluation (cont.)

Strong Applications will include:

- Summary of **Applicant qualifications** related to proposed training activities.
- **Reasonable budget** relative to proposed activities; cost competitiveness.
- **Letter(s) of Commitment from Building Owners / Property Managers** – including their cost share.

All documents should be uploaded separately
Application, Facility Info, Facility Letter(s) of Commitment, SOW, Schedule, Budget

QUESTIONS

Estimate the projected percent of annual energy savings attributable to training for O&M staff and explain your rationale based on the project's specific building(s) and training activities. Basic estimates or ranges of estimates for percent of annual energy savings are acceptable but more detailed estimates are preferred. (1 paragraph)

Briefly describe the qualifications of the training provider and the key individuals who will be developing and delivering trainings. (2 paragraphs)

LETTERS OF COMMITMENT (REQUIRED)

Attach a Letter of Commitment from the Facility that employs the workers to be trained when you submit the completed Application. The letter documents the workers' time to be spent in training and their hourly rate for purposes of applicant cost share. This Letter of Commitment should (1) be on the Facility's letterhead, (2) include a screen shot of Cost Element 4 of your completed Budget Form (Attachment D), and (3) be signed by an authorized representative. If training involves two or more property management companies or building owners, each must submit a letter.

Cost Element	Total Project Cost	Funding & Co-funding via NYSERDA	Cost-sharing & Other Co-funding
4. Facility Labor Categories/Job Titles	Hours	Rate/hr	
Total Facility Labor			

Page 2 of 3

CHECKLIST

The Applicant must verify that all of the required components, as outlined in Section III of the PON 5357 Summary, are included in your submission. Include page numbers on all documents two pages or longer, including the Statement of Work.

Attachment	
Project Application Form (Attachment A)	<input type="checkbox"/>
*Facility Information Table (Excel format)	<input type="checkbox"/>
*Facility Letter(s) of Commitment	<input type="checkbox"/>
Statement of Work (Attachment B)	<input type="checkbox"/>
Schedule	<input type="checkbox"/>
Budget (Attachment D)	<input type="checkbox"/>

Any attachments beyond those sufficient to present a complete, comprehensive, and effective response will not influence evaluation of the Application.

AGREEMENT AND SIGNATURE

I certify that all statements made in this application submission and required documents are true and correct to the best of my knowledge. I agree to the terms and conditions as set forth in [PON 5357](#).

Applicant Name and Title: _____

Applicant Signature: _____

Date: _____

Page 3 of 3

NEW YORK STATE NYSERDA

Coming Soon: “Find a Training Provider” Directory

- NYSERDA is planning on publishing a Training Provider Directory on the NYSERDA website to help building owners connect with service providers to apply to PON 5357 (like the FlexTech Consultant list).
- This list will include:
 - Training Providers who have participated in past NYSERDA Building O&M Programs
 - FlexTech Consultants who have expertise in O&M Training
- Interested in being included in this directory?
 - Eligible organizations should look for an email coming within the next month to register and submit your organization’s information.

32BJ Training Fund
Aetos Imaging
AKF Engineers
AEA
CUNY BPL
EME Consulting
EEDC
IREC
JLL
Northwest Energy Efficiency Council
Ross Energy Consulting
Smith Engineering
Solar One
Steven Winter Associates
SIG
Urban Green Council

Resources

Program Information, Case Studies, Fact Sheets and Example Project Descriptions:

www.nyserda.ny.gov/bom

www.nyserda.ny.gov/All-Programs/Clean-Energy-Workforce-Development-and-Training/Resources/Example-Training-Projects



Saving energy through staff training

Case Study

Company Name:
Weill Cornell Medicine Engineering and Maintenance Department

Training Improvements Success:

- 28 trainings attended
- 709 hours spent actively in training
- In addition to 13 staff members trained previously, 11 are now new GPRO O&M certificate holders
- Staff participation increased by 90-95% annually, from approximately 50% two years ago

Annual Water Consumption:
10% reduction across all buildings

Annual Electricity Consumption:
5% reduction in five buildings

Annual Natural Gas Consumption:
8% reduction in one building

Background

Since 1998, Weill Cornell Medicine has been among the nation's top-ranked medical and graduate schools, striving for excellence in its education of the world's future healthcare leaders. Their Engineering and Maintenance Department is responsible for a multitude of buildings, all with diverse energy needs. These research, patient care, and educational spaces are highly energy-intensive due to process loads, high ventilation rates, and special pressurization needs.

Recognizing the Need for Assistance

Understanding the need to reduce energy usage and costs, Weill Cornell Medicine reached out to the New York State Energy Research and Development Authority (NYSEDA) for assistance. With funding from NYSEDA and assistance from Urban Green Council, Weill Cornell Medicine completed GPRO@Work—a customized coaching program focused on improving operations and maintenance practices that increase energy savings. The Weill Cornell Medicine Engineering and Maintenance team developed a robust training culture and a plan for continual facility improvement.

Building Effective Communication

The maintenance team expressed interest in energy efficiency training but felt their overwhelming amount of daily tasks would not allow the time. Working alongside the engineering and maintenance director and department supervisors, the GPRO@Work Coach focused on increasing training, skill-building, and efficiency in daily operations. They worked on:

- Improving staff communication
- Creating outlines for one-on-one meetings to focus on training progress
- Developing and prioritizing staff training goals within annual reviews
- Improving feedback from the work order management system for users to recognize and reduce frequent issues

Clean Energy Workforce Development

Building Operations & Maintenance – Healthcare

Get more out of your building with NYSEDA's **Building Operations & Maintenance Workforce Training Program**

IDENTIFY training needs

PARTNER with a training organization or develop your own training

SUBMIT a proposal

\$10 MILLION available

Have a Question?

Email the Workforce Development Team at winfo@nyserda.ny.gov or visit nyserda.ny.gov/BOM

Custom, hands-on, and funded training for your healthcare facilities team

Healthcare organizations spend over \$6.5 billion on energy each year, and that amount is rising to meet patients' needs. By becoming more energy-efficient, hospitals around the country can save money. In fact, for every \$1 a non-profit healthcare organization saves on energy translates into \$20 in new revenues for hospitals, or \$10 for medical offices.¹

Keeping up with all the requirements for new equipment, new staff, new training, new best practices, and even new tenants can seem overwhelming. However, NYSEDA can help. It offers operations and maintenance (O&M) training initiatives designed to support your transition to clean energy.

By reducing energy costs just 5%, for-profit hospitals, medical offices, and nursing homes can raise earnings-per-share by a penny.²

Pathways to Improvement

By participating in NYSEDA's [Building Operations and Maintenance Training Program](#), your workforce will be properly trained in today's clean energy systems. With the right workforce training, you can expect:

- Improved indoor air quality and reduced infection transfer rates
- Reduced energy/water use and related costs
- Increased occupant satisfaction
- Improved skilled employee retention due to promotion and career advancement opportunities
- Reduced equipment breakdowns and maintenance costs
- Increased engagement in risk management instead of crisis management
- Compliance with NYC's Local Law 97 (or penalty avoidance due to non-compliance)

Just as importantly, upgrading your buildings and workforce will contribute to New York's ability to reach its ambitious goal of reducing economy-wide greenhouse gas (GHG) emissions 40% by 2030, and no less than 85% by 2050 (when compared to 1990 levels).³

NYSEDA

Project Name	Primary Organization	Partners	Projected Target to be Trained
Building O&M Training	32BJ Training Fund	Multiple building portfolios	250
<p>Description 32BJ is developing and implementing an enhanced training program for management companies with union contracts. The program includes a pre-training needs assessment, customized curriculum, training and on-site coaching, and post-training management review. The program will become a regular 32BJ course offering with the potential to train additional workers beyond the timeline of the NYSEDA-funded activities.</p>			

**Have
questions?**

Contact us at BOM@nyserda.ny.gov