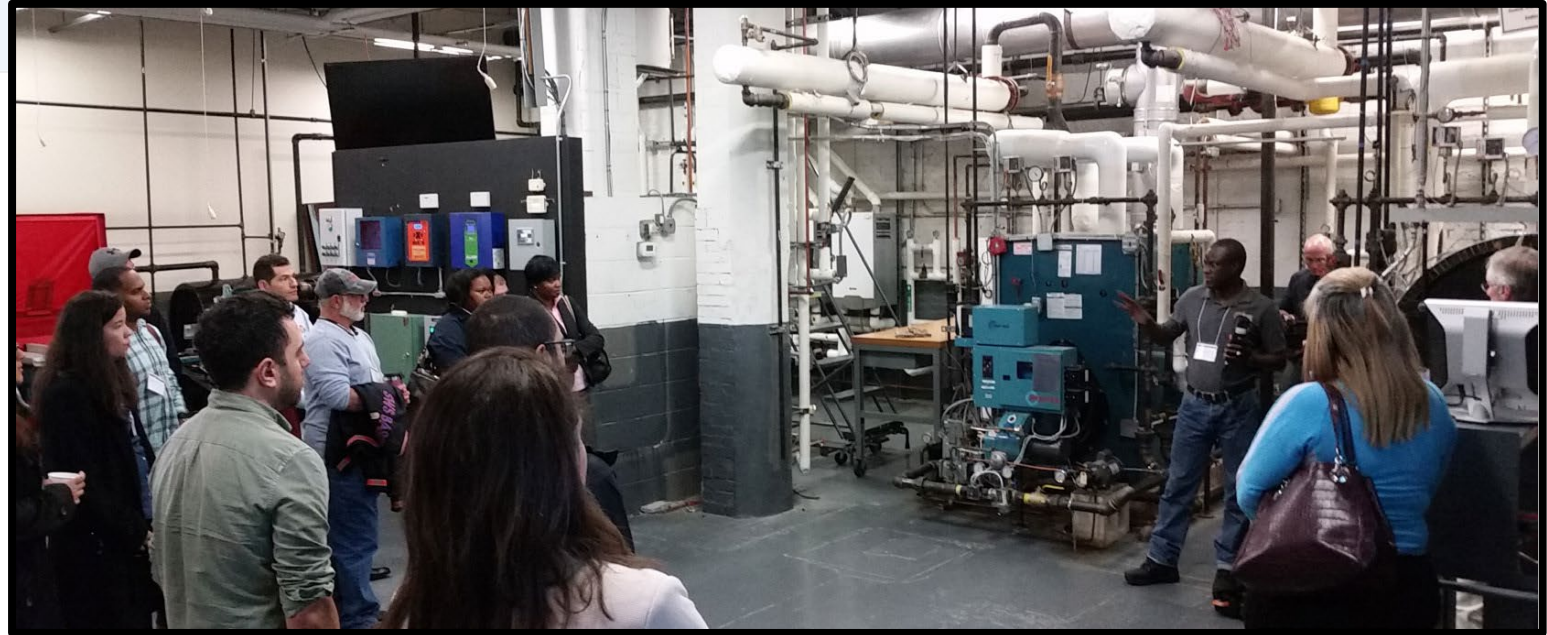


# NYSERDA Workforce Training - Building Operations and Maintenance Program

PON 3715

**Re-issued June 2021**  
**\$10M Available**



**Davetta Thacher**  
Senior Project Manager

July 6, 2021

# Changes made in June 2021 Revision

- ✓ Available funding increased to **\$10M**
- ✓ NYSERDA will provide funding of up to **70% per proposal** when 75% or more of the buildings employing O&M workers are located in a [Disadvantaged Community](#). (For all other proposals, NYSERDA will continue to provide funding of up to 50% per proposal.)
- ✓ **Six upcoming rounds** added through Nov 2022
- ✓ Proposals must now include a **Letter of Commitment** from the Facilities that are offering cost share.
- ✓ It is now emphasized that projects that include training of new hires or existing employees from either **disadvantaged communities** or **priority populations**, as defined on the [WFD Definitions page](#), are strongly encouraged and will be evaluated more favorably.
- ✓ The **points assigned** to individual Evaluation Criteria were redistributed to emphasize the importance of Replicability and Sustainability.
- ✓ The PON 3715 Summary, Application form, Sample SOW and Budget form were edited to improve readability.

# 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

# Program Resources

**\$10 million\*** in funding available to SBC/CEF electric ratepayers statewide

Additional Proposal Due Date:

Round 7: August 19, 2021

Round 8: November 18, 2021

Round 9: February 17, 2022

Round 10: May 19, 2022

Round 11: August 18, 2022

Round 12: November 16, 2022



\* NYSERDA reserves the right to extend and/or add funding to the solicitation should other program funding sources become available.

# Funding & Cost Share Requirements

NYSERDA will provide **funding of up to 70% with a cap of \$400,000 per proposal** when 75% or more of the buildings employing O&M workers are located in a Disadvantaged Community.

For all other proposals, NYSERDA will provide funding of up to 50% with a cap of \$400,000 per proposal.

In all proposals, the majority of the cost share must be provided by employers of building O&M workers.

Cost share may include cash or in-kind services.

## Examples of eligible cost share include:

- the proposer/facility's employees' wages while working on tasks defined in the SOW
- 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

# Proposer Eligibility Requirements

- Facilities that are New York State *electricity* customers and pay into the System Benefits Charge (SBC)/Clean Energy Fund (CEF)
- \* While a training organization or trade association may be the lead proposer, it must partner with a specified entity or entities employing building O&M workers (building owners, facility managers, property management companies)
- Proposals must be for training activities connected with specific buildings or portfolios/campuses of buildings, including partnerships of businesses with common training needs and skills gaps.
- Proposals must be for buildings or groups of buildings with common training needs and skills gaps.
- Total annual energy expenditures of \$1 million or more (all fuels and uses) for all buildings

\* Training programs the don't partner with buildings should see [PON 3981](#) Energy Efficiency & Clean Technology Training

# Targeted Building Types - - - O&M Occupations

- Multi-family housing
  - Commercial Office
  - Commercial Retail
  - Mixed-use
  - Educational institutions including private and public colleges/universities and K-12
  - Hospitals and healthcare
  - Hospitality
  - State and local governments
  - Not-for-profit and private institutions
  - Industrial
  - Other building types, evaluated on a case-by-case basis
- Facility and property managers
  - Operating and stationary engineers
  - Technicians
  - Building superintendents
  - Repairpersons & maintenance workers
  - Mechanics & supervisors
  - Electricians & plumbers
  - HVAC technicians
  - Procurement staff
  - Facility coordinators
  - Energy/sustainability managers
  - Porters

# Eligible Activities

Proposals should be aimed at continuously advancing the skills of new and/or existing building O&M workers.

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.

## **Eligible Activities:**

- On-site training laboratories
- Curriculum development or revision
- Career pathways training
- Coaching and mentorship
- Apprenticeships
- Training trainers with a company (training partner)
- Partnerships with manufacturers
- Planning for training replicability and sustainability

# What to Include in the Proposal

Upload each of the files identified below into Salesforce **before 3 pm on the Due Date:**

- ✓ Proposal Application Form (Attachment A)
  - \*Facility Information Table
  - \*Answers to Questions
  - \*Facility Letter(s) of Commitment
- ✓ Statement of Work (Attachment B) **see new sample SOW**
- ✓ Schedule by month from project start
- ✓ Budget (Attachment D) for proposer (training provider/building) **and subcontractors**

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

\*Although part of the Application form, these attachments must be uploaded separately.

# Application Form: Facility Information Table

## FACILITY INFORMATION TABLE

**Your application must include a table with the information below** for all building(s) whose operations and maintenance employees will participate in the proposed training project. These buildings **MUST** pay into the SBC/CEF.

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

# Application Form: Questions

## QUESTIONS

**Attach a document containing answers to the questions below** when you submit this completed Application form.

1. Proposals should be aimed at developing comprehensive workforce development and training initiatives to train new workers and/or advance the skills of existing workers. Identify the skills gaps you plan to address, explain how your proposed curriculum will fill a current gap in the training delivery market, and describe how it will be different from curriculum already available.
2. List the equipment-based or O&M-based trainings that you propose (refer to skill training target categories in Section I of the PON 3715 Summary for details).
3. Estimate the projected percent of annual energy savings attributable to training for O&M staff and explain your rationale based on the proposal'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 will be viewed more favorably.
4. List building O&M occupations or job titles that are targeted for training under this program, such as facilities and property managers; operating and stationary engineers; technicians; building superintendents; handymen; maintenance workers; porters; mechanics and supervisors; electricians; plumbers; HVAC technicians; procurement staff; facility coordinators; and energy/sustainability managers. Identify the total numbers of existing employees and/or proposed new hires in each job title, and the total number of employees overall that will be trained.
5. To demonstrate project replicability after NYSERDA funding has ended, the Facility organization should plan to use training resources developed through the project to train additional building operators at the other buildings in the organization's portfolio. Describe the additional buildings potentially impacted, including number of buildings, estimate of square footage and the projected number of additional building operators trained during the first 3 years after project completion.



# Application Form: Facility Letter(s) of Commitment

## LETTERS OF COMMITMENT (REQUIRED)

**Attach a Letter of Commitment from the Facility that is offering cost share** when you submit this completed Application form. The letter should include the data table taken from Cost Element 4 of Attachment D – Budget Form (shown below.) This letter should be on the Facility's letterhead and be signed by an authorized representative.

Cost Element			Total Project Cost	Funding & Co-funding via NYSERDA	Cost-Sharing & Other Co-funding
4. Facility Labor - Specify Titles	Hours	Rate/HR			
Total Facility Labor					

# Evaluation Criteria

1. Cost Effectiveness of the Proposal – 10 Points
2. **Replicability** Across the Building Portfolio – 20 Points
3. Energy Savings Goals and Verified Energy Savings – 17 Points
4. **Sustainability** after NYSERDA Support Has Ended; Training Integrated into Corporate Culture - 15 Points
5. Statement of Work – 12 Points
6. Efforts to Hire or Advance Workers from Disadvantaged Communities and/or Priority Populations – 10 Points
7. Plan to Identify and Measure Non-Energy Benefits – 8 Points
8. Maximize Impact and Leverage Existing Resources - 8 Points

- Note that the points assigned to individual Evaluation Criteria were redistributed to emphasize the importance of Replicability and Sustainability.
- Projects that include training of new hires or existing employees from either disadvantaged communities or priority populations, as defined on NYSERDA's WFD Definitions page, are strongly encouraged and will be evaluated more favorably.

# List of PON 3715 Contractors

## (Training Partners and Buildings)

<b>32BJ Training Fund</b>	<b>NYU Medical Center</b>
<b>AKF Engineers</b>	<b>Related Management</b>
<b>Association for Energy Affordability (AEA)</b>	<b>RiseBoro Community Partnership</b>
<b>Energy Economic Development Corp.</b>	<b>Rensselaer Polytechnic Institute</b>
<b>FirstService Energy</b>	<b>Smith Engineering</b>
<b>Housing Works</b>	<b>Steven Winter Associates</b>
<b>Interstate Renewable Energy Council (IREC)</b>	<b>SUNY Brockport</b>
<b>Lefrak Estates LP</b>	<b>SUNY Poly</b>
<b>Memorial Sloan Kettering Cancer Center</b>	<b>The City College of New York</b>
<b>Montefiore</b>	<b>The Cooper Union</b>
<b>NYS School Facilities Association</b>	<b>Urban Green Council</b>

# Current Workforce Funding Opportunities

## [RFQL 4145](#)

**Clean Energy Training Services**

## [PON 3715](#)

**Workforce Training – Building Operations & Maintenance, \$10 million**

## [PON 3981](#)

**Energy Efficiency & Clean Technology Training, \$6.7 million**

## [PON 3982](#)

**On-the-Job Training for Energy Efficiency & Clean Technology, \$12.5 million**

## [PON 4000](#)

**New York State Clean Energy Internship Program, \$4 million**

## [PON 4463](#)

**Career Pathway Training Partnerships for High Efficiency HVAC and Heat Pumps, \$4.8 Million**

# Learn More

Workforce Development and Training  
Website: <https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Workforce-Development>

# Questions?

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