



# P-12 Schools - Clean Green Schools Initiative

## Round 3

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Demonstration Projects

5-6-26



**NYSERDA**  
New York State Energy Research  
and Development Authority

# 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 Chat feature at any time during the event.
- Today's presentation will be posted to - [nyserdera.ny.gov/CGS](https://nyserdera.ny.gov/CGS)

# Overview of Clean Green Schools Initiative

- **Budget:**

- \$100 M
  - \$50 M of Sustainable Future Program funding
  - \$50 M of Regional Greenhouse Gas Initiative funding

- **Program Goal:**

- The goal of the Program is to help Priority Districts decarbonize their building portfolio, improve indoor air quality (IAQ), and enhance extreme heat resilience across their buildings.

- **Eligibility:**

- All public school districts across NYS that are designated as Priority Districts or public school buildings, and Boards of Cooperative Educational Services (BOCES) buildings which are located in a disadvantaged community
  - *Priority Districts include P-12 public school districts identified using the New York State Education Department's Needs to Resource Index or districts that serve Disadvantaged Communities.*
  - *The Priority District list can be found on the CGSI website.*

# Program Structure

- Construction Funding:
  - The Program will provide funding on a competitive basis to implement construction projects which will help schools decarbonize their buildings and reduce extreme heat exposure, leading to safer learning environments, improved air quality, reduced emissions, and a pathway towards electrification.
- 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.
- Proposals due 8/18/26 by 3:00 pm Eastern Time.
- Applicants must have an energy study or equivalent analysis completed at the time of an application.

# Eligible Projects

- **Category 1 - Clean Heating and Cooling Projects:**
  - Ground Source Heat Pump
  - Air Source Heat Pump
  - Variable Refrigerant Flow System
  
- **Category 2 – Energy Load Reduction Projects:**
  - 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 and insulation of distribution systems (e.g., steam to hot water) to support potential future electrification

# Eligible Projects

- 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
  - Building 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)
  - Clean Energy Educational and Professional Development Activities
- *All 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):*
  - If the proposal is selected to receive NYSERDA funding, the applicant shall evaluate the feasibility of utilizing equipment that contains a natural or other refrigerant with a global warming potential (GWP) of less than 10 and it shall be installed if deemed feasible.

## Ineligible Projects:

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

# Funding

- **One Building:**
  - \$500,000 - \$5,000,000 for eligible project types
  - Clean Energy Educational and Professional Development Activities targeted at students and educational staff are capped at \$30,000.
  - Up to \$50,000 of additional funding is available for School Facilities Staff Training to support operation and maintenance training on new equipment and building systems installed as a result of the awarded project
  - Total max funding per school building is \$5,050,000
  
- **Multiple Buildings:**
  - \$500,000 - \$10,000,000 for eligible project types
  - Clean Energy Educational and Professional Development Activities targeted at students and educational staff are capped at \$100,000.
  - Up to \$50,000 of additional funding is available for School Facilities Staff Training to support operation and maintenance training on new equipment and building systems installed as a result of the awarded project
  - Total max funding per multiple buildings is \$10,050,000

# Funding

- Applicant project costs are up to 100% funded, net of funding from state aid, federal funding, or any other funding source, with a minimum award of \$500,000.
- NYSERDA expects projects to seek applicable state aid, federal funding and grants to reduce costs. Participation in utility programs does exclude an application to this Program if applying to fund the same measure.
- School districts can submit as many project applications as they desire. Given the availability of funding, school districts will be capped at \$15,000,000 from the available funds and those funds will be allotted in the order of ranks. If additional funds are made available, additional projects will be considered in the order of ranks.
- NYSERDA reserves the right to partially fund a proposal.

# Proposal Requirements

- **A complete Proposal package includes the following:**
  - Completion of the series of questions presented in NYSERDA's online portal submission platform
  - Climate Hazard Screening Form (Attachment A)
    - *This form must be completed for each building included in the project.*
  - School Authorization Form, if applicable (Attachment B)
  - Proposal Template (Attachment D)
  - Building Impacts Table (Attachment E)
  - Milestone Payment Schedule (Attachment F)
  - Energy study or equivalent analysis used to select the project components
- **The Proposer may be either the school or an authorized representative of the school.**
- **If awarded, the school or school district is the entity NYSERDA contracts with and is the responsible party for the execution of the scope of work and the receiver of funding disbursements.**
- **Work completed prior to NYSERDA issuing an award letter is ineligible for funding.**
- **Proposals are due on **8/18/26** by 3:00 pm EST.**
- **Read the PON and ask questions!**

# 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: Category 1 - Clean Heating and Cooling projects and Category 2 – Energy Load Reduction Projects. If a project includes measures from both categories, it will be evaluated under the Category 1 - 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.

# 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 load (Category 1)  
OR
  - Project includes installation of Energy Load Reduction Projects (Category 2).
  - 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 to help the school and if applicable the community, adapt to climate-related risks.

# Proposal Evaluation

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

# 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.
  - Project Team's prior performance and engagement with NYSERDA programs (e.g. Clean Green Schools Initiative and FlexTech Program).
  - Preference will be given to projects implemented by contractors that are participating in New York State Department of Labor (NYS DOL) recognized "direct entry" pre-apprenticeship programs or NYS DOL registered apprenticeship programs.

# 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.

# **Contract Example – *Milestone Payment Schedule***

- After proposals are reviewed, NYSERDA will issue a letter to each Applicant indicating the proposal evaluation results. Applicants receiving favorable evaluations will be invited to enter contract negotiations with NYSERDA.
- Part of the contract negotiation process includes developing the Milestone Payment Schedule to be included in the final contract.
- Fixed Price payments shall be made based on completed Deliverables for all Tasks except for Task 4 (Construction & Installation) which shall be reimbursed based on actual costs incurred by the Contractor in accordance with the Milestone Payment Schedule.

# Contract Example – Milestone Payment Schedule

Milestone Payment Schedule by Task				
Task	Task Name	Deliverable(s)	Completion Deadline	NYSERDA Not to Exceed Milestone Payment
Task 0	Project Management and Progress Reporting	A. SEQRA & SHPO Documentation	Nov 15, 2026	\$10,000
		B. Kickoff Meeting Report	Within one (1) week following the kickoff meeting	\$5,000
		C. Quarterly Progress Reports	Quarterly, within one (1) week following the call	\$30,000
		D. Annual Progress Memo	Annually, by December 31st	\$5,000
Task 1	Construction Documents and Regulatory Approval Documentation	A. Electronic set of 100% completed Construction Documents	January 15, 2027	\$600,000
		B. Regulatory (i.e. SED) filing paperwork for project approval	April 15, 2027	\$63,000
		C. Regulatory Approval Documentation, Addenda, Permits	August 15, 2027	\$50,000
		D. Evaluation of low GWP refrigerants for HVAC Systems	August 20, 2027	\$5,000
Task 2	Tracking Impact	A. M&V Plan Review	Within two (2) weeks following receipt of the draft M&V Plan	\$15,000
		B. Pre-Construction M&V Data	Data submitted prior to commencement of <b>Tasks 3 &amp; 4</b>	\$15,000
		C. Post-Construction M&V Data	Within 13 months following all required and NYSERDA approved commissioning reports ( <b>Task 5C</b> )	\$15,000

# Contract Example – Milestone Payment Schedule

Milestone Payment Schedule by Task				
Task	Task Name	Deliverable(s)	Completion Deadline	NYSERDA Not to Exceed Milestone Payment
Task 3	Construction Administration	A. Construction Document Addenda issued during Bidding, Memo of the selected Contractors and the executed Owner/Construction Contactor Agreements	November 15, 2027	\$10,000
		B. Schedule of Values	Within one (1) month of Task 3C completion	\$10,000
		C. Approved shop drawings and submittals	Within one (1) month following Task 4 completion.	\$10,000
		D. Change Orders	Monthly, during Construction	\$10,000
		E. Site Observation Report at Substantial Completion	Within one (1) week following construction substantial completion	\$10,000
		F. Inspection Reports and Meeting Minutes from bi-weekly field meetings	Within one (1) month following Task 4 completion.	\$10,000

# Contract Example – Milestone Payment Schedule

Milestone Payment Schedule by Task				
Task	Task Name	Deliverable(s)	Completion Deadline	NYSERDA Not to Exceed Milestone Payment
Task 4	Construction & Installation	Approved AIA G702 Application and Certificate for Payment and G703 Continuation Sheet, or equivalent, for Work Completed by each contractor	Monthly, during construction	\$9,000,000
Task 5	Commissioning and Training	A. Draft Commissioning Plan	September 15, 2029	\$10,000
		B. Final Commissioning Plan	Within one (1) month following the draft commissioning plan submission	\$10,000
		C. Final Commissioning reports for all installed equipment	Within one (1) month following commissioning completion	\$10,000

# Contract Example – Milestone Payment Schedule

Milestone Payment Schedule by Task				
Task	Task Name	Deliverable(s)	Completion Deadline	NYSERDA Not to Exceed Milestone Payment
Task 6	Technology Transfer	A. Draft Case Study	Within three (3) months following all required and NYSERDA approved commissioning reports <b>(Task 5C)</b>	\$15,000
		B. Final Case Study	Within one (1) month following receipt of NYSERDA's draft case study review comments	\$15,000
		C. Case Study Distribution	Within one (1) month following receipt of NYSERDA approval of the Final Case Study	\$15,000
Task 7	Clean Energy Educational and Professional Development Activities	A. School Facilities Staff Training #1	Within two (2) months following all required and NYSERDA approved commissioning reports <b>(Task 5C)</b>	\$20,000
		B. School Facilities Staff Training #2		\$20,000
		C. Summary of the interactive training		\$12,000
Task 8	Project Final Report	A. Draft Project Final Report	Within thirteen (13) months following receipt of NYSERDA approval of all other Project deliverables <b>(Tasks 0 thru 7)</b>	\$25,000
		B. Project Final Report	Within one (1) month following receipt of NYSERDA comments on the Draft Project Final Report	\$25,000
			<b>TOTAL</b>	<b>\$10,050,000</b>

# Other Funding Information

- **NYSERDA**
  - If awarded, the school or school district is the entity NYSERDA contracts with and is the responsible party for the execution of the scope of work and the receiver of funding disbursements.
- **New York State Building Aid:**
  - Through a provision in the enacted 2022/2023 NYS Budget, this program incentivizes school districts to invest in clean energy and energy efficient projects that will improve indoor air quality and reduce emissions by eliminating the reduction in Building Aid that districts would otherwise face for projects receiving a grant through NYSERDA's Clean Green Schools Initiative.
  - Project revenue from the Clean Green Schools Initiative shall not be deducted from the buildings 5-year rolling Maximum Cost Allowance.
  - For purposes of the Maximum Cost Allowance accounting, it has been determined that the entire ground source heat pump system costs may be considered in the construction category in lieu of incidentals when funded, partially or in whole, by a Clean Green Schools grant.

# 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.
- **New Funding for School Facilities Staff Training:**
  - This funding will support activities for School Facilities Staff to support operation and maintenance training on new equipment and building systems installed as a result of the proposed project.

# Progress to Date

- **Progress to Date (Round 1 and 2):**
  - NYSERDA has awarded more than \$82 million to 14 installation projects (45 buildings) funded through the Environmental Bond Act, Regional Greenhouse Gas Initiative (RGGI) and Clean Energy Fund.
  - NYSERDA is in the process of negotiating contracts with additional school districts across the state and expects to announce awarded projects later this year.



# Important Dates and Resources

- **Proposals Due (Round 3):**
  - August 18, 2026 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 -nyseda.ny.gov/CGS](https://www.nyseda.ny.gov/CGS)
- **FlexTech Program Website (energy study support):**
  - Visit the FlexTech Program website to see the most current list of Program resources, template documents, guidance documents and more.
    - [Link –https://www.nyseda.ny.gov/All-Programs/FlexTech-Program](https://www.nyseda.ny.gov/All-Programs/FlexTech-Program)
- **Future Rounds**
  - NYSERDA anticipates coordinating Round 4 of the Clean Green Schools Initiative in Q1 2027.

# Questions

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