

# New York School Bus Incentive Program

## Implementation Manual

March 2024



NEW  
YORK  
STATE

School Bus  
Incentive Program

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## Definitions for NYSBIP

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**Battery Storage** is a battery-based energy storage device located at the site of electricity use, such as a stationary battery or a battery integrated into a Charger at a school bus charging site. This can either be connected to the grid or stand-alone.

**Charge Management Software** is an integrated or standalone software tool that helps optimize charging to reduce electricity costs, minimize charging logistics, and ensure vehicles are charged to the appropriate level when needed.

**Charger** is an individual unit and attached hardware that dispenses electricity to an electric vehicle. The Charger, in this manual, includes the charging station and attached cord(s) and Charging Port(s) that deliver electricity from a Charger to an electric vehicle. Single Chargers have a single Charging Port originating from a single pedestal, pole-mount, ground-mounted, or wall-mount; dual Chargers are stations that have two Charging Ports originating from a single pedestal, pole-mount, ground-mounted, or wall-mount. For the purposes of NYSBIP, Charger will be considered analogous to charging station.

**Charging Port** is a plug that attaches to an electric school bus or other electric vehicle that connects to and provides power to charge a vehicle.

**Charging Infrastructure** includes the Charger and all hardware associated with the Installation, including Customer-Side "Make-Ready" Equipment (see Customer-Side "Make-Ready" Equipment definition).

**Charging Operator** is the entity that will operate the Charging Equipment. This may be the School District or a Third-Party Operator.

**Charging Station:** See the definition for Charger.

**Charging Voucher** is the reserved voucher funds and Charging Voucher Redemption process specifically to fund Charging Infrastructure and Installation costs.

**Charging Voucher Application** is the process by which a Purchaser supplies information to the [NYSBIP Charging Voucher Portal](#) to obtain a Charging Voucher incentive set aside for Eligible Charging Costs.

**Charging Voucher Redemption** is the process by which a Purchaser submits final milestone information to the NYSEDRA Portal to trigger disbursement of the Charging Voucher funds to the Purchaser.

**Contractor Portal** is an online system, utilizing Salesforce software, that entities selling eligible vehicles use to apply to become a Dealer in the program.

**Customer-Side “Make-Ready” Equipment** includes electrical site upgrades on the customer’s side of the electric meter. This includes, but is not limited to, switchgear, electrical panel upgrades, wiring and conduit, and trenching.

**Dealer** is an Electric School Bus (ESB) dealership, Original Equipment Manufacturer (OEM), or Upfit/Retrofit Manufacturer (URM) that sells Eligible Vehicles or Charging Infrastructure directly to a Purchaser or end-user. In the case of Repowered School Buses, the Dealer is the entity that sells the repower equipment to the Fleet and performs the repower on the school bus.

**Disadvantaged Community (DAC)** is currently defined as a census block that meets the criteria established by the NYS Climate Action Council's Climate Justice Working Group to be designated a Disadvantaged Community. An [interactive map](#) to determine whether a location is in a Disadvantaged Community is available for reference.

**Domicile** is the location where the ESB will be registered, stored, maintained, and/or generally be located (such as a fleet depot) when not performing duties.

**Electric School Bus (ESB)** is an on-road, zero-emission school bus with a gross vehicle weight rating (GVWR) of Class 3-8 that operates solely by use of a battery pack or hydrogen fuel cell propulsion system. For the purposes of NYSBIP, ESBs are primarily designed and used for pupil transportation and include Repowered School Buses.

**Eligible Charging Costs** includes the items/activities that NYSBIP Charging Voucher will reimburse, generally including Charging Infrastructure and Installation (check section 3.2) for requirements and eligible costs).

**Eligible ESB** is an electric school bus that meets all program rules and requirements and is on the [NYSBIP Eligible ESB List](#).

**Fleet** is the vehicle fleet of a commercial, nonprofit, or public sector entity (excluding federal governmental entities) that domiciles, registers, and/or operates Class 3-8 GVWR vehicles in New York State. Fleet vehicles cannot be registered to an individual.

**Fleet Electrification Plan** is a comprehensive evaluation of existing fleet operations, analysis of current site electrical capabilities, and a plan for electrifying the Purchaser’s entire school bus fleet to ESBs by 2035. The plan will serve as a guide, or action plan, that identifies and prioritizes recommendations to assist Purchasers with making informed decisions.

**Gross Vehicle Weight Rating (GVWR)** is the maximum operating weight/mass of a vehicle as specified by the manufacturer and described on the original manufacturer line setting ticket provided to the vehicle dealer. Refer to this table of weight classes.

| Vehicle Class | Gross Vehicle Weight Range              |
|---------------|---|
| Class 3       | 10,001 – 14,000 pounds (4,536–6,350 kg) |
| Class 4       | 14,001–16,000 pounds (6,351–7,257 kg)   |
| Class 5       | 16,001–19,500 pounds (7,258–8,845 kg)   |
| Class 6       | 19,501–26,000 pounds (8,846–11,793 kg)  |
| Class 7       | 26,001–33,000 pounds (11,794–14,969 kg) |
| Class 8       | ≥33,001 pounds (≥14,969 kg)             |

**High-Need/Resource Capacity (High N/RC) Districts** are school districts with high need/resource capacity indices, according to the Need/Resource Capacity Categories developed by the [New York State Education Department](#) (NYSED). This is a measure of a district's ability to meet the needs of its students with local resources and is quantified by the ratio of the estimated [poverty percentage](#) (expressed in standard score form) to the [Combined Wealth Ratio](#) (expressed in standard score form). A district with both estimated poverty and Combined Wealth Ratio equal to the State average would have a need/resource capacity index of 1.0.

**Incremental Cost** is the difference in cost between the new Eligible ESB and a comparable new diesel- or gasoline-fueled school bus that would be purchased to perform the same function. For the purposes of this program, the entire cost to repower a school bus is considered its incremental cost.

**Installation** includes the design, construction, and labor associated with permanently affixing a charging station at a site and connecting it to the necessary power source to be able to charge an electric school bus.

**Installation Date** is the date on which a Charger is affixed to its permanent location, connected to the electrical source, and is ready for use (including connected to a network for Networked Charger).

**Installer** is a certified electrician who has experience installing Charging Infrastructure.

**In-Service** is a bus that has been delivered, in working order, accepted by the fleet, and not subject to any unresolved recalls.

**Internal Combustion Engine (ICE) Vehicle** is a vehicle with an engine powered by burning fuels such as diesel fuel, gasoline, ethanol, or natural gas.

**Joint Utilities (Utilities)** are comprised of Central Hudson Gas and Electric Corp., Con Edison, National Grid, New York State Electric & Gas Corp., Orange and Rockland Utilities, Inc., and Rochester Gas and Electric Corp.

**Level 2 Charger** is a type of Charger that uses a 240V alternating current connection to deliver electricity to an electric vehicle. ESBs generally require at least 19.2 kW and can be fully charged by a Level 2 Charger in 6 to 11 hours.

**Level 3 Direct Current Fast Charger (Level 3 Charger), or DCFC Charger**, refers to a type of charger that uses up to 600V direct current connection to deliver between 30 kW to 125 kW to an electric vehicle. A DCFC Charger can typically fully charge an ESB in 1 to 5 hours.

**Line Setting Ticket** is the factory build or construction sheet created when the vehicle order is sent to the vehicle manufacturer.

**Managed Charging/Smart Charging** are vehicle charging schemes that use networked chargers and optimized charging plans to balance vehicle energy needs and site energy control objectives such as managing the peak load.

**Meter/Sub-Meter** a device that records the amount of power flowing through an electrical circuit to calculate electricity bills.

**Networked Chargers** are EV Chargers that are connected to the internet for the purpose of one or more of the following: data collection, energy management and demand response, payments, remote troubleshooting, reservation systems, advertising, and other application add-ons. Networked Chargers may be managed with Charge Management Software (see Managed Charging/Smart Charging).

**New York School Bus Incentive Program Website:** <https://www.nyserda.ny.gov/All-Programs/Electric-School-Buses/NY-School-Bus-Incentive-Program-Overview>

**[NYSBIP Charging Voucher Portal](#)** is the Salesforce software system that Purchasers must use to apply for charging Vouchers. The portal will also allow Purchasers to check the status of their voucher progress and upload program required documents for voucher approval and voucher redemption approval.

**NYSBIP School Bus Stacking Voucher** is the new School Bus Voucher incentive amount that a Purchaser can receive if they are choosing to stack incentive funds from other federal and state programs for their ESB.

**Nonprofit** is an agency or corporation that is exempt from federal income taxes under Section 501 of the Internal Revenue Code (26 U.S.C. § 501).



[NYSERDA Portal](#) is the Salesforce software system that Dealers must use to apply for School Bus Vouchers. The portal will also allow Dealers and Purchasers to check the status of their voucher progress and upload program required documents for voucher approval and voucher redemption approval.

**Original Equipment Manufacturer (OEM)** is the company that builds or assembles, at a minimum, the completed drive train and chassis for an Eligible Vehicle.

[Participating Vehicle Dismantler](#) is a facility that will perform the Scrappage of an eligible old internal combustion engine (ICE) vehicle according to NYSBIP guidelines.

[Priority Districts](#) are school districts that are either High-Need/Resource Capacity districts or school districts in which over 40% of the total area population lives within a DAC. These districts qualify for a 'Priority District' bonus.

**Purchaser** is the entity that will directly purchase, own, and operate the ESB and/or Charging Infrastructure. The Purchaser may be a School District or a Third-Party Operator.

**Replacement ESB** is a new Eligible ESB that replaces an existing ICE school bus of similar or higher weight class that has been scrapped to qualify for a scrappage bonus.

**Repowered School Bus** is an existing school bus, at least six years older than the current model year, that had its existing internal combustion engine scrapped and replaced with a new zero-emission engine, motor, drivetrain, and battery. For the purposes of NYSBIP, Repowered School Buses are considered ESBs (refer to Electric School Bus definition).

**School Bus Operator** is the entity that will operate an Eligible ESB. This may be the School District or a Third-Party Operator.

**School Bus Voucher** refers to the reserved voucher funds specifically to fund the difference in cost between an ESB and a diesel/gas school bus equivalent.

**School Bus Voucher Application** is the process by which a Dealer supplies information to the [NYSERDA Portal](#) to obtain a School Bus Voucher incentive set aside for an Eligible ESB.

**School Bus Voucher Redemption** is the process by which a Dealer submits final milestone information to the NYSERDA Portal to trigger disbursement of the School Bus Voucher funds to the Dealer.

**Scrappage (Scrapped or Scrap)** is verifiably rendering inoperable an ICE school bus with an engine dated 7 years or older than the year of application by verifiably cutting a three-inch hole in the engine block and disabling the chassis by cutting the school bus's frame rails completely in half.

**Telematics** is the technology of sending, receiving, and storing information using telecommunication devices that have been installed in an Eligible Vehicle by a fleet participant.

**Third-Party Operator** is a party engaged by a school district to operate school buses and/or associated Charging Infrastructure on behalf of the school district for pupil transportation purposes.



**Type A School Bus** is a smaller bus built on a cutaway front-section school bus with a carrying capacity of 10–25 passengers. Type A school buses are split into two sub-groups: Type A-1, having a Gross Vehicle Weight Rating (GVWR) of less than 10,000 pounds, and Type A-2, having a GVWR of 10,000 pounds or more.

**Type C School Bus** is a full-length school bus with a “truck-front” design. A Type C school bus can carry between 60-72 passengers. The GVWR is usually between 23,500 lbs. and 29,500 lbs.

**Type D School Bus** is a full-length school bus with a “transit-front” design. A Type D school bus can carry between 72-90 passengers. The GVWR is usually between 25,000 lbs. and 36,000 lbs.

**Upfit/Retrofit Manufacturer (URM)** is a company that installs equipment on a truck or bus rolling chassis purchased from an OEM. For the purposes of NYSBIP an Upfit/Retrofit Manufacturer must bear full responsibility under federal law for any school bus defects and is responsible for certifying the school bus meets all applicable federal safety standards.

**Utility-Side “Make-Ready” Equipment** covers all electric system upgrades on the Utility’s side of the charging meter (i.e., typically not owned by the fleet owners). This includes, but is not limited to transformers, the distribution network, and the electrical meter. This infrastructure is not eligible for reimbursement under NYSBIP. In some cases, Utility-Side Make-Ready Equipment is eligible for reimbursement by the Joint Utilities.

**Vehicle-to-Grid (V2G)** is a type of charging that enables an ESB’s battery to send stored electricity back to the grid when connected to power. This is typically done during peak demand times and when the ESB has an extended layover period. V2G capability has the potential to generate revenue for School Bus Operators when utilities have programs to enable its utilization.

**Voucher Approval Date** is the date on which NYSEDA approved a project and sets aside funding for a ESB project. Dealers and Purchasers must submit all documentation for reimbursement within 15 months of the voucher approval date. NYSEDA may approve extensions.

**Voucher Help Center (VHC)** is the primary program point of contact for Manufacturers, Dealers, and Purchasers. The VHC answers questions related to the program and reviews voucher applications upon submission. Contact the VHC via email [NYSBIP@energycenter.org](mailto:NYSBIP@energycenter.org) or call 866-595-7917.

# 1 Program Overview

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In the 2022 budget, the New York State Legislature and Governor Hochul established a deadline for the transition from internal combustion engine (ICE) school buses to zero-emission buses. Specifically, all school buses purchased in New York State must be zero-emission buses by 2027 and all school buses operating within the State must be zero-emission by 2035. Zero-emission school buses are either electric school buses (also referred to as ESBs) or hydrogen fuel cell school buses. Also in 2022, State voters overwhelmingly voted for the [Clean Water, Clean Air, and Green Jobs Environmental Bond Act](#) (Bond Act), which includes \$500M to support the transition to zero-emission school buses. NYSERDA has established the New York School Bus Incentive Program (NYSBIP) to distribute the Bond Act funding to school districts thus helping to achieve the State public purposes and assisting school districts in complying with the zero-emission school bus mandate.

NYSBIP is a voucher incentive program aimed to accelerate the deployment of zero-emission school buses in the medium- and heavy-duty vehicle weight classes. Voucher incentives facilitate fleet adoption of ESBs by reducing the upfront prices of ESBs, which are currently more expensive than comparable ICE school buses, and the associated Charging Infrastructure. Vouchers make it more affordable for fleets to gain experience with cleaner technologies that often cost less to operate than diesel and gasoline school buses. NYSERDA hopes that this reduction in cost will increase the use of zero-emission vehicle technologies. Increased use of zero-emission technologies benefits the health of students and drivers by improving air quality. When a zero-emission school bus replaces an ICE school bus it eliminates greenhouse gas and other harmful vehicle tailpipe emissions. A transition to zero-emission school buses also lessens the State's transportation sector's dependence on petroleum.

NYSBIP goals are to:

- Accelerate the deployment of zero-emission bus technology to reduce greenhouse gas emissions and air pollution.
- Reduce the upfront costs to New York State school districts of purchasing zero-emission school buses and associated Charging Infrastructure.
- Provide environmental and health benefits to all New Yorkers, with a focus on improved outcomes for residents of Disadvantaged Communities as defined by the Climate Act.

## 1.1 About the Program

The NYSBIP is an incentive program that provides grants to a school district or group of school districts to offset all or a portion of the purchase price of Electric School Buses (ESBs) and/or associated Charging Infrastructure to be used to service the students of those school districts. In the case where a school district contracts with a Third-Party Operator to provide school bus services, the grant to the school district may be applied to make a one-time payment for a portion of the purchase price of Bus(es) and/or associated Charging Infrastructure that are purchased by the operator and will serve the students of that school district.

NYSBIP provides two voucher incentives: the School Bus Voucher (section 2) and the Charging Voucher (section 3). **It is important to note that two voucher applications are required to reserve incentive funds for both School Buses and Charging Infrastructure.**

The School Bus Voucher incentive works as follows: a Purchaser agrees to purchase an Eligible ESB from a Dealer qualified to sell that ESB through NYSBIP. The Dealer then deducts the value of the School Bus Voucher from the total sale price. Once the Dealer has supplied all required documentation to verify all steps of the School Bus Voucher process, and scrappage (if applicable), is complete, NYSERDA reimburses the Dealer for the full School Bus Voucher amount. By providing the School Bus Voucher to the Purchaser at the point of purchase in the form of a discount off the total purchase price, NYSBIP makes ESB acquisitions easier, less expensive, and helping to distribute the benefits of ESB deployment within New York State.

To receive a Charging Voucher, a Purchaser will submit a Charging Voucher Application. To qualify Purchasers must demonstrate initiation of an ESB purchase either through NYSBIP or with other funds (e.g. EPA Clean School Bus Program, self-funded). Purchasers will upload basic information about the Chargers they select to the application on or within thirty (30) days of submitting a Charging Voucher Application. Once the application is approved, a Purchaser performs any Charging Infrastructure upgrades associated with the Chargers. After Installation, the Purchaser supplies all required documentation to verify all steps of the Charging Voucher process is completed to NYSERDA. NYSERDA then reimburses the Purchaser for costs covered by NYSBIP up to 100% of the Charging Voucher amount.

## 1.2 About the Implementation Manual

This Implementation Manual outlines the process, requirements, rules, and funding parameters of NYSBIP to provide School Districts and other members of the public with information on how to participate. NYSERDA may make changes to the Implementation Manual at any time. NYSBIP participants are bound by the version of Implementation Manual in effect at the time their voucher application is submitted. In other words, voucher applications, voucher redemption protocols, and all other program elements associated with those vouchers must follow the directions outlined in the most recent version of the Implementation Manual posted on the NYSBIP website at the time of voucher submittal. The most recent Implementation Manual, as well as all required forms and agreements, can be found on the [NYSBIP website](#). Notice of all changes will be provided to participants via their designated email addresses, as identified in the voucher application.

## 1.3 General Program Rules

NYSERDA will not make a voucher payment until all requirements for voucher redemption are met and approved by NYSERDA (section 9 and section 11).

If the Purchaser and Dealer does not provide proper documentation for School Bus Voucher Redemption, NYSERDA is NOT responsible for the deficit in funding for the ESB purchased.

Partial voucher payments will not be made on an individual ESB. Partial voucher payments may be made for individual ESBs on a multi-vehicle voucher request.

If requesting a scrappage bonus, failure to comply with all applicable scrappage requirements will result in the denial of the scrappage bonus.

NYSERDA will determine and update School Bus Voucher amounts—based on the average purchase price difference between all ESBs and comparable diesel or gasoline school buses in each ‘type’ of bus (e.g., Type A, C, D)—and post that information in the NYSBIP Eligible ESB List on the [NYSBIP website](#). This allows prospective Purchasers to know the estimated ‘base’ ESB incentive amount (before eligible bonuses or add-ons are applied, check section 2.1 for more information) prior to negotiating an ESB price with the Dealer. NYSERDA will determine and update Charging Voucher amounts on the NYSBIP website.

NYSERDA, at its sole discretion, will determine the final value of a voucher at the time of application approval. Project-specific information, such as vehicle domicile address and Fleet Electrification Plan may impact the final voucher amount and will be determined when the application is approved.

### 1.3.1 Voucher Publicity

All Program participants, including Purchasers and Dealers, must collaborate with NYSERDA’s Director of Communications, at least ten (10) business days in advance, to prepare any press release and to plan for any news conference concerning work related to the NYSBIP. NYSBIP participants must notify the Voucher Help Center and NYSERDA Project Managers in advance of any media interview or press event in which work related to NYSBIP, including ESBs or Charger Infrastructure for which the purchase was facilitated using vouchers, is referred to or discussed. Purchasers must not use NYSERDA corporate name, logo, identity, any affiliation, or any related logo, without prior written consent from NYSERDA.

### 1.3.2 Voucher Stacking

NYSBIP awards may be combined (“stacked”) with other eligible public incentives where applicable. Such incentives may include, but are not limited to, the Inflation Reduction Act (IRA) Tax Credits and available utility “Make-Ready” programs such as the Medium- and Heavy-Duty Make-Ready Pilot Program. In no instance may the total incentive amount exceed 100% of the value of the ESB and/or Charging Infrastructure. Purchasers must submit documentation to NYSERDA showing all other public incentives received/awarded for the ESBs and/or Charging Infrastructure. If it comes to NYSERDA’s attention that ESB or Charging Infrastructure has received or is slated to receive incentives totaling more than 100% of the value of the ESB and/or Charging Infrastructure, NYSERDA will reduce the NYSBIP award accordingly or request reimbursement of excess incentives if incentive payments have already been made.

### 1.3.2.1 U.S. EPA Clean School Bus Program Stacking

NYSBIP incentives and EPA Clean School Bus (CSB) Program award funding may be stacked for the same vehicles. However, under NYSBIP buses that are funded through a CSB Program award are only eligible for the funding amounts listed in the table below, the NYSBIP School Bus Stacking Voucher amount.

If a School Bus Operator applies to NYSBIP and is approved and then receives an award through the CSB Program, the NYSBIP School Bus Voucher amount will be adjusted to the NYSBIP School Bus Stacking Voucher amount. The NYSBIP School Bus Stacking Voucher amount is determined based on whether the Purchaser is an EPA “priority” or “non-priority” district (Table 1). Please note that EPA and NYSBIP Priority District differ and the NYSBIP School Bus Stacking Voucher amount is determined by the EPA designations.

The NYSBIP School Bus Stacking Voucher is awarded on top of the amount awarded by the CSB Program, up to 100% of the average ESB price (refer to section 2.1). Purchasers who choose this option forfeit any Bonus Amounts described in section 2.3 and 2.4. When combined with the CSB Program awards, this stacking approach results in a significantly higher total award amount than the standard NYSBIP incentive.

If a School Bus Operator receives a CSB Program award for one or more ESBs before applying to NYSBIP, it may also apply for the NYSBIP School Bus Stacking Voucher if it has not already paid for the ESBs being purchased. If the NYSBIP application is approved, the Dealer will discount the price of the ESB by the NYSBIP School Bus Stacking Voucher amount for the Purchaser. At School Bus Voucher Redemption, the Dealer will receive the NYSBIP School Bus Stacking Voucher amount. For more information about School Bus Voucher Redemption, refer to section 9.

**Table 1. NYSBIP School Bus Stacking Voucher Amounts**

|   | EPA Priority District |          |          | EPA Non-Priority District |           |           |
|---|-----------------------|----------|----------|---------------------------|-----------|-----------|
|   | Type A                | Type C   | Type D   | Type A                    | Type C    | Type D    |
| NYSBIP School Bus Stacking Voucher Amount | \$50,000              | \$50,000 | \$50,000 | \$100,000                 | \$100,000 | \$100,000 |

NYSERDA reserves the right to review, change, or eliminate these stacking amounts at any time.

### 1.3.3 Program Contacts

All Program questions can be directed to the Voucher Help Center (VHC):

**NYSBIP Voucher Help Center**

866-595-7917

[NYSBIP@energycenter.org](mailto:NYSBIP@energycenter.org)

If you are unable to contact personnel at the VHC, or if there are issues that the VHC cannot resolve, please contact the NYSERDA project managers responsible for the Program:

**Hannah Abdoo**

Project Manager

1359 Broadway, 19<sup>th</sup> Floor, New York, NY 10018-7842

(518) 862-1090

[Hannah.Abdoo@nyserda.ny.gov](mailto:Hannah.Abdoo@nyserda.ny.gov)

Send an email to [schoolbus@nyserda.ny.gov](mailto:schoolbus@nyserda.ny.gov) for more information.

## 2 School Bus Voucher Requirements and Amounts

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A School Bus Voucher will be issued for the net eligible incremental cost of an ESB after all other incentives are accounted for and after the application has been determined to meet all program eligibility criteria. If the Purchaser qualifies for the Equipment Add-Ons described below, the Purchaser will be issued a voucher for the net eligible incremental cost plus the total amount of funding for the qualifying Equipment Add-Ons. The incentive amounts shown below may change over time. Once a School Bus Voucher is approved, that School Bus Voucher is eligible for the incentive amount shown in the Implementation Manual at the time of the School Bus Voucher Application submission.

### 2.1 Base School Bus Voucher Amounts

The base School Bus Voucher amounts for NYSBIP are intended to cover a large percentage of the incremental cost of an ESB. School Bus Voucher amounts are categorized by type of bus (e.g., Type A, Type C, Type D) and by whether the ESB is purchased new or if it is an existing school bus that is being repowered. The base School Bus Voucher amounts are shown in Table 2. The base School Bus Voucher amounts were determined by subtracting the average price of all internal combustion engine (ICE) school buses on the [OGS State School Bus Contract](#) in each category from the average price of all ESBs in that category. Repowered School Bus incremental values were determined based on industry research. The maximum School Bus Voucher amounts, once all available School Bus Voucher Bonuses (Bonus) and Complementary School Bus Voucher Add-Ons (Add-Ons) are applied, are shown in Table 3. NYSERDA reserves the right to change the incentive amounts shown below.

**Table 2. Base School Bus Voucher Amounts**

| School Bus Type        | Percentage of Incremental Cost Covered | Base School Bus Voucher Dollar Amount |
|------------------------|--|---------------------------------------|
| New Type A (NTA)       | 60%                                    | \$114,000                             |
| New Type C (NTC)       | 60%                                    | \$147,000                             |
| New Type D (NTD)       | 60%                                    | \$156,000                             |
| Repowered Type A (RTA) | 75%                                    | \$105,000                             |
| Repowered Type C (RTC) | 75%                                    | \$135,000                             |



**Table 3. School Bus Voucher Bonus and Add-On Amounts**

| School Bus Type | Priority District Bonus Amount | Scrappage Bonus Amount | V2G Add-On Amount | Wheelchair Add-On Amount |
|-----------------|--------------------------------|------------------------|-------------------|--------------------------|
| NTA             | \$28,500                       | \$47,500               | \$9,500           | \$8,000                  |
| NTC             | \$36,750                       | \$61,250               | \$12,250          | \$8,000                  |
| NTD             | \$39,000                       | \$65,000               | \$13,000          | \$8,000                  |
| RTA             | \$21,000                       | N/A                    | \$7,000           | N/A                      |
| RTC             | \$27,000                       | N/A                    | \$9,000           | N/A                      |

\*Check section 2.3.

## 2.2 School Bus Voucher Rules

Purchasers must comply with the following rules of the School Bus Voucher:

- The eligible ESB must travel at least 5,000 miles per year for the 5 years of required reporting to NYSBIP.
- An ESB must be purchased from a Dealer approved to participate in NYSBIP (check section 6).
- Repowered School Buses may be eligible for funding if the school bus has an expected operational lifespan after repowering of at least five (5) years. For the purposes of Repowered School Buses, the entire cost of the repower is considered the incremental cost.
- NYSBIP funding may not be used to pay for the purchase or installation of fuel-fired heaters, although these may be installed at Purchaser’s cost.

## 2.3 School Bus Voucher Bonus Amounts

School Bus voucher amounts can be increased through Bonuses that can be obtained through meeting additional criteria or taking additional actions. The Bonuses are defined in this section, which includes information on Purchaser and school bus eligibility and Bonus amounts (which are added to the Base School Bus Voucher dollar amounts in Table 1). A Purchaser may receive all, some, or none of the Bonuses depending on whether it meets the criteria.

### 2.3.1 Priority District Bonus

Priority District buses are buses that serve Priority Districts as defined in section 7.1.1.

- **Eligible school buses:** All bus types are eligible for this bonus.
- **Eligible Purchasers:** Those meeting the Priority Districts criteria included in section 7.1.1.
- **Bonus amounts:** An additional 15% of the incremental cost will be applied to the base School Bus Voucher amount as depicted in Table 4.

**Table 4. Priority District Bonus Amounts**

| School Bus Type | Bonus Amount |
|-----------------|--------------|
| NTA             | \$28,500     |
| NTC             | \$36,750     |
| NTD             | \$39,000     |
| RTA             | \$21,000     |
| RTC             | \$27,000     |

### 2.3.2 Scrappage Bonus

The Scrappage Bonus applies when a Purchaser destroys the school bus being replaced, ensuring that the school bus will not be sold or used elsewhere.

- **Eligible school buses:** New Type A, C, and D buses qualify. Repowered School Buses do not qualify. For additional eligibility requirements check section 5.1.
- **Eligible Purchasers:** All Purchasers applying for a School Bus Voucher for a new bus (e.g., not Repowered School Buses) qualify.
- **Bonus amounts:** An additional 25% of the incremental cost will be applied to the base School Bus Voucher amount as depicted in Table 5.
- **Documentation:** Check section 9.1.1

**Table 5. School Bus Scrappage Bonus Amounts**

| School Bus Type | Bonus Amount |
|-----------------|--------------|
| NTA             | \$47,500     |
| NTC             | \$61,250     |
| NTD             | \$65,000     |
| RTA             | N/A          |
| RTC             | N/A          |

### 2.3.2.1 *Scrappage Bonus Requirements*

To receive the Scrappage Bonus the Purchaser must scrap an in-service school bus, as defined below.

#### *Scrappage Definition*

A school bus is considered scrapped when rendered inoperable and available for recycling, by cutting a three-inch hole in the engine block and disabling the chassis by cutting the school bus's frame rails completely in half.

- To destroy the engine: Cut or drill a minimum three-inch hole through the engine block.
- To destroy the chassis: Cut or shear both the chassis rails between the two axles.

The school bus to be scrapped must meet the following requirements to qualify for the Scrappage Bonus portion of the School Bus Voucher:

- The school bus must be owned by the Purchaser or the school district that the Purchaser is providing transportation services for and must be an in-service school bus, meaning:
  - The school bus was operated in the school district to be served by the ESB within the last twelve (12) months. If the Purchaser is a Third-Party Operator that has not previously served the school district where the ESB will serve, the Purchaser may scrap a school bus domiciled in the same or adjacent county to the school district where the ESB will serve;
  - The school bus was operated in NYS during twenty-four (24) of the previous thirty-six (36) months; and
  - The school bus has been driven 2,500 miles or more in the last twelve (12) months.
- The school bus engine must be a model year at least seven (7) years older than the year of application (e.g., if applying in 2024 the bus engine must be model year 2017 or older).
- Existing school buses must be replaced with the same school bus type or a smaller type (e.g., a Type C bus may be scrapped to receive the bonus for a Type A bus, but a Type A bus cannot be scrapped for a Type C bus application).
- The school bus must be an internal combustion engine bus using any fuel type (scrappage of diesel school bus is preferred where feasible).
- Additional information regarding the scrappage process requirements and documentation can be found in section 9.1.

## 2.4 Complementary School Bus Voucher Add-Ons

In addition to the Bonus amounts, two additional School Bus Voucher Add-Ons (Add-Ons) are available for Purchasers that request specialized equipment be installed on their ESBs. The amounts are intended to help cover the additional expenses associated with these school bus modifications:

### 2.4.1 Vehicle-to-Grid Technology Add-On

This Add-On applies to ESBs that include vehicle-to-grid (V2G) capability. NYSERDA will determine whether ESB models are V2G-capable (or whether they come with the option of being V2G-capable) when it reviews each Vehicle Eligibility Application. NYSERDA will indicate the V2G status on the [Eligible ESB List](#).

- **Eligible school buses:** All school bus types are eligible for this bonus.
- **Eligible Purchasers:** All Purchasers applying for a School Bus Voucher qualify.
- **Add-on amounts:** An additional 5% of the incremental cost will be applied to the base School Bus Voucher amount as depicted in Table 6.

**Table 6. V2G Technology Complementary Add-On Amounts**

| School Bus Type | Add-On Amount |
|-----------------|---------------|
| NTA             | \$9,500       |
| NTC             | \$12,250      |
| NTD             | \$13,000      |
| RTA             | \$7,000       |
| RTC             | \$9,000       |

### 2.4.2 Wheelchair Accessibility Add-On

This Add-On applies for ESBs that are wheelchair accessible.

- **Eligible school buses:** New Type A, C, and D buses. Repowered School Buses do not qualify.
- **Eligible Purchasers:** All Purchasers applying for a School Bus Voucher qualify.
- **Add-on Amounts:** An additional \$8,000 will be added to the base School Bus Voucher amount as depicted in Table 7.

**Table 7. Wheelchair Accessibility Add-On Amounts**

| School Bus Type | Add-On Amount |
|-----------------|---------------|
| NTA             | \$8,000       |
| NTC             | \$8,000       |
| NTD             | \$8,000       |
| RTA             | N/A           |
| RTC             | N/A           |

## 2.5 School Bus Voucher Caps

In line with the goal of NYSBIP to enable all school districts an opportunity to participate, the following caps will be placed on the number of ESB Vouchers each Purchaser may seek. The voucher caps listed below apply until December 1, 2025.

- School District-Owned Fleets

- Each school district may apply for the greater of six (6) ESBs or 6% of their fleet.
- Each Priority District may apply for the greater of ten (10) ESBs or 10% of their fleet.
- School districts can apply for the greater of an additional 4% or four (4) ESBs if they complete an approved Fleet Electrification Plan (check section 3.1.1) demonstrating Utility engagement for Charging Infrastructure design and a timeline for receiving ESBs.

After December 1, 2025, school districts may apply for additional ESB Vouchers if funding remains.

- Third-Party Operator-Owned Fleets

- **In line with the per-district requirements below, Third-Party Operators may apply for a maximum of fifty (50) buses before December 1, 2025. Third-Party Operators may apply for an additional twenty-five (25) buses after December 1, 2024, if those buses serve *Priority Districts that have bus depots within a DAC.***
- Each Third-Party Operator may apply for the greater of six (6) ESBs or 6% of its fleet serving each non-priority school district with which it contracts.
- Each Third-Party Operator may apply for the greater of ten (10) ESBs or 10% of its fleet serving each Priority District with which it contracts.

- Third-Party Operators may apply for the greater of an additional four (4) ESBs or 4% of its school buses serving each school district with which it contracts. If they complete an approved Fleet Electrification Plan demonstrating Utility engagement for Charging Infrastructure design and a timeline for receiving ESBs.
- NYSBIP considers New York City (NYC) as one school district, therefore Third-Party Operators serving the NYC Department of Education (NYCDOE) may apply for a maximum of fifty (50) buses before December 1, 2025, and an additional twenty-five (25) buses stored in DACs after December 1, 2024.

These caps will be reviewed and, if funding allows, lifted, once efforts to reach every school district have been made. Caps for school district-owned fleets and Third-Party Operator-owned fleets vary slightly. Applications from school districts that both own school buses and contract out to Third-Party Operators, and school districts that hold contracts with multiple Third-Party Operators, will be reviewed on a case-by-case basis to ensure alignment with the ESB Caps.

## 2.6 Declining School Bus Voucher Incentives

The total cost of ownership (TCO) of ESBs is expected to reach parity with that of ICE buses around 2027 and ownership of ESBs is expected to become more favorable beyond 2027. Since the upfront purchase price of an ESB is the main driver of TCO, NYSBIP anticipates lowering incentive amounts as the market purchase prices for new ESB's decrease. NYSERDA will monitor costs on an annual basis while NYSBIP is active and adjust incentive amounts accordingly. While no declining amounts are currently scheduled, it is important for Purchasers to understand that incentive amounts may decrease.

## 3 Charging Voucher Requirements and Amounts

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Purchasers may apply for Charging Vouchers after they initiate an ESB purchase either through NYSBIP or with other funding (e.g. EPA Clean School Bus Program, self-funded). Purchasers may apply for Charging Vouchers associated with any ESB the Purchaser purchased on or after January 1, 2023. The maximum number of Eligible Chargers is equal to the number of ESBs purchased, through any funding source, by the Purchaser.

NYSERDA will calculate the dollar amount of the Charging Voucher by multiplying the per-bus amount the Purchaser is eligible to receive (refer to Table 7) by the total number of ESBs being purchased. For example, if a Purchaser serving a Non-Priority District purchases five (5) ESBs, they may receive a \$125,000 Charging Voucher, or \$25,000 for each ESB they are purchasing. The Charging Voucher funding can be used to reimburse Eligible Charging Costs, including Level 2 or DCFC charging stations and the equipment and installation costs associated with installing them, after all other incentives are accounted for and after the application has been determined to meet all NYSBIP criteria. Purchasers may use this funding to install Charging Ports up to the number of ESBs being purchased, or one more than the number of ESBs if the number is odd and the Purchaser is installing dual port charging stations.

Charging Ports can be any combination of Level 2 and DCFC stations; for example, if a Purchaser buys five (5) ESBs, they may purchase and install up to five (5) single port Level 2 Chargers, three (3) dual port Level 2 Chargers (totaling six Charging Ports), one (1) single port DCFC Charger and one (1) dual port Level 2 Charger, etc.

Once a Charging Voucher is approved, the Purchaser may claim reimbursement for the Eligible Charging Costs (refer to section 3.2) up to the incentive amount shown in the Implementation Manual at the time of the Charging Voucher Application submission. It is recommended that Purchasers of Chargers complete a Fleet Electrification Plan to identify charging needs before applying to NYSBIP to ensure the fleet is purchasing and installing appropriate Charger(s) for their needs and there is enough power for the chosen solution.

### 3.1 Charging Voucher Amounts

Charging Vouchers can be used to cover 100% of Eligible Charging Costs up to the amount of the Charging Voucher. The base Charging Voucher amounts are intended to cover all or most of the cost of a lower-voltage (e.g., Level 2) Charger, Customer-Side Make-Ready Equipment, and Installation costs. Purchasers that have completed a Fleet Electrification Plan qualify for a higher Charging Voucher amount. Purchasers that serve a Priority District also qualify for a higher Charging Voucher amount.

Charging Voucher amounts are determined based on Priority District status, which is defined in section 7.1.1, and whether the Purchaser has conducted a Fleet Electrification Plan, which is defined in section 3.1.1. The Charging Voucher amounts are included in Table 8. NYSERDA reserves the right to change the incentive amounts shown below. Incentive amounts are determined based on the amounts shown in the



Implementation Manual at the time of the Charging Voucher Application submission. In line with the vehicle caps (refer to Section 2.5), each Purchaser is limited to \$2 million in Charging Voucher funds before December 1, 2025.

**Table 8. Maximum Charging Voucher Amounts**

|                              | <b>Base Voucher Amount</b> | <b>With Fleet Electrification Plan</b> |
|------------------------------|----------------------------|--|
| <b>Non-Priority District</b> | \$25,000                   | \$55,000                               |
| <b>Priority District</b>     | \$35,000                   | \$65,000                               |

### 3.1.1 Fleet Electrification Plan Requirements

A Fleet Electrification Plan is a comprehensive evaluation of existing fleet operations, analysis of current site electrical capabilities, and a plan for electrifying the Purchaser’s entire fleet by 2035. The plan will serve as a guide that identifies and prioritizes actions to help Purchasers make informed decisions about electrifying their fleets. Fleet Electrification Plans may demonstrate the need for higher powered Charging Infrastructure or more sophisticated charging systems, which tend to be more expensive. The higher Charging Voucher amounts available to Purchasers who have completed a Fleet Electrification Plan (as indicated in Table 8) reflect the importance of consulting with a qualified engineering contractor and electric utility to determine the appropriate Charging Infrastructure. Fleet Electrification Plans typically include the items detailed in Table 9.

**Table 9. Fleet Electrification Plan Contents**

| <b>Title</b>          | <b>Description</b>   |
|-----------------------|--|
| Electrification Goals | An overview of the electric bus assessment and the approach to fleet electrification. This may include the proposed timeline and milestones for electrification.   |
| Route Analysis        | Analysis of the time and distance involved in each available bus route, which is necessary to understand the range requirements. The analysis will define the specification requirements (hilly, etc.) for each bus route to provide recommended minimum battery requirements and the total energy required to charge the batteries.   |
| Utility Assessment    | An assessment, performed by your Utility, that analyzes your existing grid connection and determines how much additional electrical capacity is required. This assessment will tell you what equipment needs, upgrades, and costs are needed to provide that additional power.   |
| Charging Strategy     | Development of a charging strategy that includes Charger power ratings and quantities and preferred times of day to charge. The charging strategy will include identification of demand during on-peak and off-peak times.   |
| Phasing Plan          | Development of a phasing plan identifying necessary capital works projects, vehicle replacement plan, and phased plan for Charger Installation aligned with vehicle replacement plan. This phasing plan should include a schedule and transition cost estimate for Utility upgrade/sitework, bus purchases, and Charger purchases, as well as a comparison of operating costs. |

To demonstrate the completion of a qualifying Fleet Electrification Plan, Purchasers must provide a copy of their Fleet Electrification Plan with their Charging Voucher Application in the [NYSBIP Charging Voucher Portal](#). If a Purchaser has not completed their Fleet Electrification Plan at the time of application, the Purchaser can still qualify for the increased incentive amount if the plan is completed within one hundred eighty (180) calendar days of Charging Voucher pre-approval (refer to section 10.2). The Purchaser must submit a copy of a signed agreement between the Purchaser and a third-party creating the Fleet Electrification Plan. If a Purchaser is completing their Fleet Electrification Plan through NYSERDA Technical Assistance Program, the NYSERDA-issued contract number is sufficient.

The uploaded Fleet Electrification Plan documents will be reviewed and verified by NYSERDA prior to qualification for the higher Charging Voucher incentive amount. NYSERDA has sole discretion to determine whether the Fleet Electrification Plan documentation will qualify the Purchaser for the higher Charging Voucher incentive amount. If the plan is deemed incomplete or insufficient based on the table above, Purchasers will be able to revise and resubmit their Fleet Electrification Plan within thirty (30) days of receiving feedback.

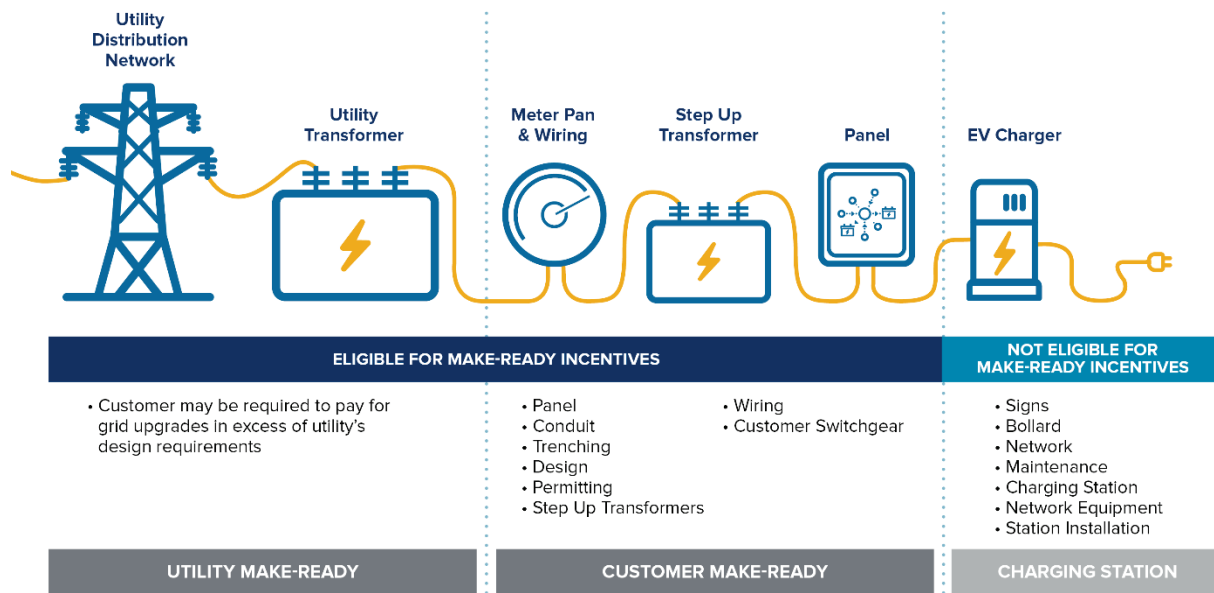
## 3.2 Eligible Charging Costs

### 3.2.1 Eligible Charging Infrastructure and Installation Costs

The following list contains Charging Infrastructure and Installation costs eligible for reimbursement with the NYSBIP Charging Voucher:

- Charger hardware costs.
- Charger Installation costs associated with Charger hardware costs and labor including, but not limited to, trenching, concrete pads, repaving, and basic site restoration. **NOTE:** All projects funded with Bond Act proceeds must comply with the prevailing wage requirements found in Section 220 of the New York Labor Law.
- Customer-Side “Make-Ready” Infrastructure costs, which covers electrical site upgrades on the customer’s side of the electrical meter (Figure 1). This includes, but is not limited to, upgrades to switchgears, electrical panel upgrades, wiring, and conduit.
- Battery Storage Equipment installed in conjunction with the Charger to address ESB charging needs.

**Figure 1. Utility- and Customer-Side "Make-Ready" Infrastructure Components**



NYSBIP will **not** cover the following infrastructure costs:

- Networking costs
- Extended warranties
- Permitting fees
- Project management costs
- Utility-Side "Make-Ready" Infrastructure costs
- Solar PV

### 3.2.2 Requirements for Charging Infrastructure

All eligible Charging Infrastructure must meet the following requirements to be eligible for reimbursement:

- The equipment must be new and designed to pass inspection according to the National Electrical Code, Article 625. The equipment must be certified by a National Recognized Testing Laboratory (for example, UL category FFWA). Resale units, rebuilt, rented, received from warranty insurance claims, or new parts installed in existing units are not eligible for incentives. **For outdoor Installations, a rating of NEMA (National Electrical Manufacturers Association) 3R or greater is required.**

- Conform to ANSI/NFPA 70, electric code, and any other relevant codes or standards imposed by the local Authority/Authorities Having Jurisdiction (AHJ).
- Must have a product warranty that lasts at least two years from Installation. The warranty period should start the day that the equipment is installed and ready for use. Proof of warranty will be required alongside receipts of purchase for fund disbursement. Purchasers may acquire an extended warranty; however, extended warranties are not eligible for Charging Voucher reimbursement.
- Must be Energy Star®-certified.
- Must have the most current software version available at the Installation date and shall be factory calibrated within original manufacturer standards.
- Must be compliant with the most recent revision of National Institute of Standards and Technology (NIST) Handbook 130 and NIST Handbook 44.

### 3.2.3 Charger Requirements

All Chargers must meet the following requirements to be eligible for reimbursement:

- Must be able to dispense at least 19.2 kW from each Charging Port, simultaneously.
- Both single and dual port Chargers are eligible (refer to section 3)
- Eligible Charging Infrastructure must utilize Charging Connectors and charging interfaces that are compatible with the school buses purchased.
- Must be certified by a Nationally Recognized Testing Laboratory (NRTL) recognized by the United States Occupational Safety and Health Administration (OSHA). OSHA's complete list of NRTLs can be found on the [OSHA website](#).
- NYSERDA recommends that Chargers be networked for charge management and data reporting purposes. However, at this time networking is not required. Instead, Chargers must be capable of networking so that this capability may be used in the future. To be capable of networking a charger must:
  - Use Open Charge Point Protocol (OCPP) as a basic framework for purposes of network interoperability and communication with back-end network services providers. Chargers must support OCPP v1.6 or newer.
  - Chargers shall support network interoperability and be certified OCPP 1.6 or newer. Proprietary network software may be used if the Charger can switch to another OCPP compliant network provider at the end of any contract agreement.
  - NYSERDA reserves the right to require third-party certification of OCPP compliance at a later date.

Network connectivity (one of the following is required):

- 4G LTE cell phone equipment with a 3 dB exterior mounted antenna

- Institute of Electrical and Electronics Engineers (IEEE) 802.3 for Ethernet for local- or wide-area network applications (requires an internet protocol (IP) address and registered).
- IEEE 802.11n for high bandwidth wireless networking.

Additional means of network communication are allowable and may include the following:

- Automated Demand Response (Open ADR, International Electrotechnical Commission (IEC) 62746-10-1 ED1).
  - Those outlined by the Smart Grid Interoperability Panel Catalog of Standards, the NIST Smart Grid Framework, the American National Standards Institute, or other well-established international standards organizations such as ISO, IEC, International Telecommunication Union, IEEE, or Internet Engineering Task Force.
  - Those outlined by the Smart Grid Interoperability Panel Catalog of Standards, the NIST Smart Grid Framework, the American National Standards Institute, or other well-established international standards organizations such as ISO, IEC, International Telecommunication Union, IEEE, or Internet Engineering Task Force.
  - Must be capable of managing charging costs and supporting grid reliability. Eligible Charging Infrastructure shall leverage the open standards-based network communications described above and be capable of receiving energy management signals from an Electric Vehicle Service Provider (EVSP), energy management system, and/or Utility. Eligible Charging Infrastructure must be capable of automatically adjusting charging output (kW), subject to the constraints of NIST Handbook 44.
  - Note: Purchasers who are unable to install Networked-Capable Chargers due to limited internet availability may request an exemption. To request an exemption please contact the VHC. NYSERDA will make the final determination on exemption requests.
- The Purchaser must certify that the Charger(s) as installed meet all applicable local, State, and Federal codes (by signing the Charging Infrastructure Installer Certification) and that they followed or required their Installer to follow the Prevailing Wage requirements found in Section 220 of the New York Labor Law.

# 4 NYSBIP Process

This section provides a high-level overview of the various components of the NYSBIP process. This includes how:

- Manufacturers qualify their individual ESBs models for School Bus Voucher eligibility.
- Dealers obtain approval to sell ESBs through NYSBIP.
- Dealers submit School Bus Voucher Applications for approval.
- Dealers submit School Bus Voucher Redemption and receive approval.
- Dealers receive the School Bus Voucher payment.
- Purchasers submit Charging Voucher Applications for approval.
- Purchasers submit Charging Voucher Redemption and receive approval.
- Purchasers receive the Charging Voucher payment.
- Purchasers submits ESB and Charger Usage Reporting during the first five years of operation.

## 4.1 School Bus Voucher Process

Key Participants in the School Bus Voucher Process:

- **Manufacturer:** An Original Equipment Manufacturer (OEM), the OEM’s authorized dealer, or Upfit/Retrofit Manufacturer (URM).
- **Dealer:** An authorized seller of Eligible ESBs.
- **Purchaser:** An eligible entity that will be receiving the buses (section 7).
- **Voucher Help Center (VHC):** The primary program point of contact for OEMs, URMs, Dealers, and Purchasers.

Figure 2. ESB Voucher Process Diagram for Each Stakeholder

### School Bus Voucher Process

#### Manufacturer



#### Dealer



#### Purchaser



1. **ESB Eligibility Approval** – A Manufacturer submits a completed [ESB Eligibility Application](#) to the VHC. This application provides information on the ESB to be reviewed for eligibility. Once approved, ESBs are listed on the [NYSBIP website](#) in the Eligible ESB List. Check section 5 for details on ESB eligibility requirements and process.
2. **Dealer Approval** – A Dealer authorized to sell an eligible ESB applies to NYSEDA to become an approved Dealer applying through the [Contractor Portal](#) (check section 6 for details on Dealer eligibility and process). Approved Dealers may then market program incentives to prospective Purchasers and submit School Bus Voucher Applications to NYSEDA.
3. **School Bus Voucher Application** – When a Purchaser is ready to purchase an eligible ESB from an approved Dealer, the Dealer submits a School Bus Voucher Application to reserve funds for that specific ESB purchase (check section 8 for details on the School Bus Voucher Application process). The full School Bus Voucher amount must be deducted from the final sale price of the ESB at the point of sale and passed on to the Purchaser.
4. **School Bus Voucher Application Approval** – The VHC and NYSEDA will review the School Bus Voucher Application and notify the Dealer if there are any issues or missing information, or if the application is approved. If the School Bus Voucher Application is approved, funds are reserved for the Eligible ESBs identified in the application. New ESBs must be delivered to Purchasers after the date of the School Bus Voucher Application to be eligible for NYBIP funding. Repowered School Buses must have their retrofits completed after the date of the School Bus Voucher Application to be eligible for NYBIP funding.
5. **School Bus Voucher Redemption** – After the Purchaser takes delivery of the eligible ESB, registers the ESB, pays for it in full (total ESB cost minus the School Bus Voucher amount), and satisfies any applicable scrappage requirements, the Dealer completes the School Bus Voucher Redemption process in the [NYSEDA Portal](#). This consists of uploading all required documentation for final approval (check section 9 for details of the School Bus Voucher Redemption process). This information must be uploaded for each individual ESB for which the Dealer seeks to receive a School Bus Voucher payment. School Bus Vouchers must be redeemed within 15 months of the School Bus Voucher Application approval date. NYSEDA can approve extensions of up to 6 months (check section 9.2.2 for details of the School Bus Voucher extension process).
  - a. Scrappage information: The Purchaser must provide the Dealer with all required scrappage documentation within this timeframe, and the Dealer must upload all scrappage documentation to the [NYSEDA Portal](#) before the School Bus Voucher can be redeemed. Scrappage can occur any time between the date of School Bus Voucher Application approval up to twenty-one (21) days after ESB delivery (check section 9.1 for details of the scrappage process and documentation).
6. **School Bus Voucher Payment** – The VHC and NYSEDA review the School Bus Voucher Redemption documents, and if all documents are approved, NYSEDA will issue a School Bus Voucher payment to the Dealer. Dealers should enroll in electronic funds transfer (EFT) payment processing to receive timely School Bus Voucher payments. To sign up for payment by EFT,



complete an [Electronic Fund Transfer \(EFT\) Authorization Form](#) (check section 9.3 for details of the School Bus Voucher payment process).

7. **Operations and Reporting** – The Purchaser must operate new ESBs for no less than five (5) years from the date of delivery or Installation respectively. The Purchaser is required to submit ESB Usage Reports for five (5) years from the date of delivery (check section 12 for additional details).

## 4.2 Charging Voucher Process

Key Participants in the School Bus Voucher Process:

- **Purchaser:** An eligible entity that will own the Charging Infrastructure (check section 7).
- **Installer:** A New York State licensed electrician with experience installing ESB Chargers. Purchasers may install the Charging Infrastructure itself or hire an Installer to do so.
- **Voucher Help Center (VHC):** The primary program point of contact for Purchasers.

Figure 3. Charging Voucher Process Diagram

### Charging Voucher Process



Utility-Side upgrades can require long lead times for purchase and installation. Prior to submitting a Charging Voucher Application, it is highly recommended that Purchasers complete a Fleet Electrification Plan. The planning process will help identify any needed Utility-Side upgrades and may influence the location of Charging Infrastructure on-site. Purchasers can also engage directly with their Utility to determine if infrastructure upgrades are necessary. In addition, Purchasers should work with their ESB Dealer to determine whether a particular Charger meets the requirements in section 3.2 and is compatible with the ESBs they are purchasing.

1. **Charging Voucher Application** – The Purchaser of Chargers and associated eligible Charging Infrastructure accesses the NYSBIP Charging Voucher Portal from the NYSBIP website and submits a Charging Voucher Application. Purchasers will identify how many Chargers they are applying for. Each Charger must be associated with an ESB that was purchased on or after January 1, 2023. The ESB may be purchased either through NYSBIP or by other means (e.g., EPA Clean School Bus Program, self-funded). For Purchasers who have already selected their Chargers and completed their Fleet Electrification Plan (if applicable), they will identify the Charger(s) manufacturer and model and submit a product specification sheet and Fleet Electrification Plan to ensure eligibility. If a Purchaser has not yet selected Charger(s) or completed their Fleet Electrification plan, they may

submit a pre-approval Charging Voucher Application to reserve funds. The Purchaser has sixty (60) calendar days from pre-approval to upload the required Charger information for each Charger being requested to their Charging Voucher Application through the NYSBIP Charging Voucher Portal for approval. If the Purchaser is completing a Fleet Electrification Plan, the Purchaser has one hundred eighty (180) calendar days from pre-approval to upload their documentation for review and approval as part of the Charging Voucher Application. The number of Charging Ports per application must adhere to the requirements in section 3.

2. **Charging Voucher Application Approval** – The VHC and NYSEDA will review the Charging Voucher Application, once all the Charger information has been submitted and will notify the Purchaser if there are any issues or missing information, or if the application is approved.
3. **Charging Equipment Installation** – Once a Purchaser has selected a Charger, they can identify an installer and begin Installation.
4. **Charging Voucher Redemption** – After the Purchaser installs the Charging Infrastructure, ensures all electricity and networking, if applicable, is operational, and pays for the Charging Infrastructure and Installation costs in full, the Purchaser completes the Charging Voucher Redemption process in the [NYSBIP Charging Voucher Portal](#). This consists of uploading all required documentation for final approval (refer to section 11 for details of the Charging Voucher Redemption process). Charging Vouchers must be redeemed within 15 months of the voucher approval date. NYSEDA may approve extensions under certain circumstances (refer to section 11.2.2).
5. **Charging Voucher Payment** – The VHC and NYSEDA review the Charging Voucher Redemption documents, and if all documents are approved, NYSEDA will issue reimbursement for Eligible Charging Costs up to the reserved Charging Voucher amount to the Purchaser. NYSEDA will reimburse 100% of eligible expenses up to the Charging Voucher amount reserved. If Eligible Charging Costs are less than the reserved Charging Voucher, NYSEDA will reimburse the Purchaser for the total Eligible Charging Costs. If Eligible Charging Costs are above reserved amount, NYSEDA will reimburse the Purchaser for the approved Charging Voucher amount.
  - a. Purchasers should enroll in electronic funds transfer (EFT) payment processing to receive timely Charging Voucher payments. To sign up for payment by EFT, visit NYSEDA’s website and complete an [Electronic Fund Transfer \(EFT\) Authorization Form](#) (check section 11.3 for details of the Charging Voucher payment process).
6. **Operations and Reporting** – The Purchaser must operate Charger(s) for no less than five (5) years from the date of Installation. The Purchaser is required to submit Charging Usage Reports for five (5) years from the date of Charger operation (refer to section 12 for additional details).

# 5 School Bus Eligibility and Approval

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## 5.1 School Bus Eligibility Requirements

To qualify as an Eligible ESB, ESBs must meet the following requirements:

- The ESB must be a Class 3-8 Battery Electric Vehicle (BEV) or Fuel Cell Electric Vehicle (FCEV). Personal passenger vehicles are NOT eligible for program funding.
- Other than Repowered School Buses, all eligible ESBs must be new. New ESBs must have a model year (MY) that is the current calendar year or up to two years before or after the current calendar year at the time of application. Used ESB (including ESBs used by Dealers, Manufacturers, or other entities for demonstration purposes) are NOT eligible. New ESBs and/or school bus chassis cannot be previously registered in any state, fully paid for by the Purchaser, or have been delivered to the Purchaser prior to the Dealer applying for a School Bus Voucher.
- Eligible ESBs must meet all federal and New York State requirements for operation. The Manufacturer must also certify that the ESB model complies with all applicable federal safety standards for new motor vehicles and new motor vehicle equipment issued by the National Highway Traffic Safety Administration (NHTSA). The Federal Motor Vehicle Safety Standards (FMVSS) are found in Title 49 of the Code of Federal Regulations (CFR) Part 571.
- The electric motor, drive train, and battery pack must be covered by a Manufacturer's warranty. The warranty must provide protection for a minimum of 5 years (60 months). Prior to approving a school bus model as an Eligible ESB to be listed on the [NYSBIP website](#), NYSEDA may request that the Manufacturer provide copies of representative warranties for school bus, engine, and/or powertrain components (e.g., battery pack) and documentation (e.g., warranty contracts) of the Manufacturer's plans to provide routine ESB service.
- Additional requirements impacting ESB eligibility and/or incentive levels for vehicles regarding manufacturing labor and/or vehicle content origin and sustainability may be implemented in the future.

Refer to the [Eligible ESB List](#) for up-to-date information on approved ESBs.

## 5.2 ESB Approval Process

The following steps are required of ESB Manufacturers for ESB approval:

1. Download and complete the [ESB Eligibility Application](#) spreadsheet, which can also be found on NYSEDA's NYSBIP website. The Application requires general information about the ESB including:
  - Model year
  - Make and model
  - Fuel type (e.g., BEV, FCEV)

- School bus type (e.g., Type A, C, D)
  - Gross Vehicle Weight Rating (GVWR)
  - Energy/environmental attributes (e.g., kWh/mile for BEVs)
  - Manufacturer suggested retail price (MSRP) (or Buyer's Sheet) indicating ESB pre-tax cost
  - Location and nature of activities involved in final vehicle assembly
    - Whether the ESB model has V2G capabilities
    - Whether the ESB has a wheelchair accessible model
2. Email the completed ESB Eligibility Application to the VHC. A complete application shall include, at a minimum, the following items:
- Completed ESB Eligibility Application spreadsheet including attestation that the vehicle meets federal and State requirements.
  - Documents justifying the price of the eligible ESB (e.g., cut sheet).
  - Name and contact information for a New York State repair facility under contract with the Manufacturer for servicing and repairing New York State vehicles.
    - If a Manufacturer does not own a New York State repair facility or does not have a contract with a New York State entity to provide repair and warranty service (copy of contract must be provided and approved by NYSERDA), the Manufacturer must submit a written plan (including contracts) for how it intends to provide warranty service, replacement parts, and technical support in New York State within 48 hours of a service request. The maintenance/repair plan must be submitted to the VHC for approval. The plan must receive approval from NYSERDA for ESBs to be eligible to receive NYSBIP incentives.
  - Proof of a guaranteed warranty for motor, powertrain, parts, and labor for the minimum amount of time specified (check section 5.1). NYSERDA and the VHC review the [ESB Eligibility Application](#) and additional documentation for accuracy and completeness. If additional information is needed, NYSERDA or the VHC will notify the Dealer via email. If NYSERDA or the VHC find that the application is complete, and the ESB(s) are eligible, the Dealer will be notified of approval.
3. NYSERDA will list all eligible ESB(s) on the [Eligible ESB List](#), which can be found on NYSERDA's [NYSBIP website](#), so Purchasers know which ESB(s) they can purchase through NYSBIP.

# 6 Dealer Eligibility and Approval

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## 6.1 Dealer Eligibility Requirements

In NYSBIP, the Dealer is the entity that sells an approved Eligible ESB to the Purchaser. Dealers must be preapproved to sell ESBs through NYSBIP. Entities interested in becoming NYSBIP Dealers must:

- Be one of the following types of entities:
  - A school bus dealership that sells complete Eligible ESBs to Purchasers and has a written agreement with a medium- and/or heavy-duty vehicle OEM.
  - An OEM that builds and sells complete Eligible ESBs directly to Purchasers.
  - A bus URM that has a written agreement with a medium- or heavy-duty OEM, and upfits, retrofits, or performs final equipment installations on those new replacement or Repowered School Buses and sells the completed Eligible ESB to a Purchaser.
  - A retrofit kit company that produces and installs the kits on existing school buses, such as a battery electric vehicle (BEV) kit on an existing ICE school bus.
- Have a valid business license for the past two years and be registered to do business in New York State.
- Be the entity that sells the fully assembled and completed new ESBs or Repowered School Buses.

## 6.2 School Bus Dealer Approval Process

To submit a Dealer Application, the Dealer must:

1. Access the online [Contractor Portal](#) from the [NYSBIP website](#).
2. Once in the Contractor Portal, enter general company information and company contact details.
3. Select at least one make of the Eligible ESB it plans to sell as part of NYSBIP; if the Dealer is not a Manufacturer, the Dealer must upload a letter from the ESB's Manufacturer authorizing the Dealer to market and sell that brand's ESBs (OEM Letter of Consent).
4. Review and complete the following documents:
  - a. [OEM Letter of Consent](#)
  - b. [Dealer Participation Agreement](#)
  - c. If the Dealer is located outside of New York State, documentation showing how the Dealer will provide service and support to Purchasers participating in NYSBIP.
5. Submit the completed Dealer Application to NYSERDA for review.
6. NYSERDA and the VHC review Dealer Applications for completeness. If the Dealer Application is incomplete or the Dealer is not authorized to sell the Eligible ESB(s), the VHC will notify the Dealer. If

the Dealer Application is complete and approved, NYSERDA will notify the Dealer that they are now an approved Dealer. This approval will create an account for the Dealer in the [NYSERDA Portal](#).

7. NYSERDA lists the Dealer as an approved Dealer on the Eligible ESB List on the [NYSBIP website](#). Once a Dealer has been approved, it is then approved to market the NYSBIP incentives to Purchasers (check section 1.3.1).

## 6.3 School Bus Dealer Requirements

Dealers are required to pass on the full NYSBIP incentive to a Purchaser by reducing the purchase cost of Eligible ESBs by the full incentive amount.

- Dealers may not charge fees to the Purchaser in association with processing School Bus Vouchers.
- Dealers must make all NYSBIP-related records available for review by NYSERDA during the first five (5) years after the School Bus Voucher Redemption is complete on the ESB(s) that receive support through NYSBIP.

# 7 Purchaser Eligibility

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## 7.1 General Eligibility Requirements

School buses and Charging Infrastructure that serve public school districts are the sole focus of NYSBIP. Eligible school buses include Type A through Type D ESBs that are used for regular pupil transportation. Shuttle vans, trucks, SUVs, and cars that are used for pupil transportation are not currently eligible. NYSBIP is available to all public school districts regardless of need-status or Disadvantaged Community (DAC) status. Different voucher amounts apply for Priority Districts and non-Priority Districts. Eligibility is determined by the entity and school bus.

### Eligible Purchasers:

In terms of ownership, the following Fleets may apply to NYSBIP:

- New York State public school districts or other public entities that provide K-12 pupil transportation services in New York State; or,
- Third-Party Operators under contract with a New York State public school district.
- For the purposes of Program eligibility, ‘under contract’ shall mean an existing service contract between the school district and the Third-Party Operator, or a signed letter of intent detailing the proposed relationship, is in place. A Voucher Application may be submitted and approved when a school district and Third-Party Operator have a signed letter of intent or an executed contract, but the service contract must be fully executed before Voucher Redemption (check section 9 for School Bus Voucher Redemption and section 11 for Charging Voucher Redemption).

Vouchers will be awarded on a first-come, first-served basis up to the Vehicle Caps in section 2.5.

### 7.1.1 Priority School District

Priority school districts are ones that:

- Are identified as High-Need/Resource Capacity districts in the Need/Resource Capacity Categories, AND/OR
- Are school districts in which over 40% of the total district population lives within a DAC.

Additionally, Purchasers who will domicile the ESB(s) in an existing bus depot or storage facility in a [Disadvantaged Community](#) may qualify for a Priority District Bonus.

For clarity, these districts are identified on the downloadable [Priority Districts List](#).

## 8 School Bus Voucher Application and Approval

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The Dealer works with the Purchaser to complete the School Bus Voucher Application. There are separate voucher applications for ESBs and Charging Infrastructure. Both applications will be linked to ensure eligibility in the program. The Charging Voucher is submitted by the Purchaser of the Charging Infrastructure (section 10).

### 8.1 School Bus Voucher Application Process

For the School Bus Voucher, the Dealer will complete the following in the [NYSERDA Portal](#).

1. Create a new School Bus Voucher Application and enter contact information for the Dealer, Purchaser, and school district (Purchaser and school district may be the same).
2. Enter domicile address(es).
3. Enter Utility Provider.
4. Select Eligible Vehicle(s) to be purchased.
5. Enter details of new ESB(s) and school bus(es) to be scrapped (if applying for the Scrappage Bonus).
6. Agree to the NYSBIP terms and conditions.
7. Upload the following documents:
  - Signed [Purchaser Participation Agreement](#)
  - Signed [Third-Party Operator Addendum](#) (if the Purchaser leases the vehicle to a different entity).
  - Purchase Order for new ESB(s) (may be provisional).
  - Scrappage documents if applicable (check section 9.1.1).
8. Submit the School Bus Voucher Application.

### 8.2 School Bus Voucher Approval

NYSERDA and the VHC review the School Bus Voucher Application for eligibility, accuracy, and completeness. If the School Bus Voucher Application is incomplete or inaccurate, the VHC will notify the Dealer that they must resubmit the required information. The School Bus Voucher Application will be rejected if the information is not corrected within fifteen (15) business days after the VHC notification. A rejected School Bus Voucher Application can be resubmitted.

Once NYSERDA determines the School Bus Voucher Application is complete and meets all applicable requirements, the VHC will notify the Dealer of approval and reserve funds.



# 9 School Bus Voucher Scrappage and Redemption

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## 9.1 School Bus Scrappage

Purchasers or school districts who scrap an in-service ICE school bus may qualify for a voucher bonus. The Scrappage Bonus applies when a Purchaser destroys the school bus being replaced, ensuring that the school bus will not be sold or used elsewhere. A school bus is considered scrapped when a participating Vehicle Dismantler has rendered it inoperable and available for recycling, destroying the engine block and the chassis.

- To destroy the engine: Cut or drill a minimum three-inch hole through the engine block.
- To destroy the chassis: Cut or shear both the chassis rails between the two axles.

The school bus must arrive at the scrappage location with the chassis attached, the engine intact, in drivable condition, and its registration still valid. The school bus must be fully operational and functional.

### **Additional Requirements:**

- Scrappage must be performed by a participating Vehicle Dismantler; a current list of participating Vehicle Dismantlers is available on the NYSBIP website. Eligible Vehicle Dismantler facilities are located across New York State to facilitate scrappage.
- Purchasers must arrange for school bus scrappage and provide the Dealer with the date of scheduled scrappage before they can take delivery of the ESB(s).
- Scrappage can occur any time **after** approval of a School Bus Voucher Application but it must be completed with all documentation submitted to the Dealer within twenty-one (21) days of taking delivery of the new ESB(s). Failure to comply with this timeline will result in denial of the Scrappage Bonus.
- If scrappage-school buses have changed ownership during the last two years, all applicable NYS requirements, including but not limited to title transfer, and sales tax payment, must have been satisfied prior to application for funding under NYSBIP.
- During the scrappage process, before any crushing or shredding, school buses must be decommissioned, meaning having potential environmental contaminants including, but not limited to, fluids, batteries, refrigerants, mercury switches and airbags, drained and/or properly removed, consistent with New York State Department of Environmental Conservation regulations for Vehicle Dismantling Facilities under Subchapter B, Subpart 361-7 and Article 27, Title 23.

### [Subchapter B, Subpart 361-7](#)

### [Article 27, Title 23](#)

NYSBIP cannot process the School Bus Voucher until the scrappage is satisfactorily completed and photographed. Failure to comply with scrappage requirements will result in the rejection of a scrappage School Bus Voucher bonus. **It is recommended that a Purchaser representative attend the scrappage**

**event to ensure it is properly documented and that all required photos are taken to avoid delay or denial of School Bus Voucher payment.** NYSERDA may employ on-site auditors to help document scrappage events and to ensure that the process goes smoothly. Scrappage events may be subject to verification/audit at NYSERDA's discretion.

Failure to comply with all scrappage requirements will result in non-payment of the Scrappage Bonus to the Dealer. Dealers and Purchasers should be aware that NYSERDA is not responsible for any School Bus Voucher incentive payments to the Dealer if the scrappage requirements are not met. Purchasers should also be aware that, depending on the contractual agreement between the Dealer and the Purchaser, failure to meet the scrappage requirements may result in the Purchaser being required to pay the full (unreduced) price of the new ESB to the Dealer.

### 9.1.1 Required Scrappage Documents

The following documents must be submitted to NYSERDA as part of the scrappage process at the time of School Bus Voucher Application:

1. The previous two (2) DOT Inspection Records.
2. Copy of registration of school bus being scrapped (must be active at time of School Bus Voucher Application).
3. "Before" photos of the school bus being scrapped (minimum image size of 1200 x 1800 pixels or 4 x 6 inches) and submitted at the time of School Bus Voucher Application:
  - **Front of the school bus:** A photo of the entire front of the school bus, showing the license plate number.
  - **VIN / OEM plate:** A photo of the Vehicle Identification Number (VIN) or OEM plate that clearly shows the entire VIN, GVWR (gross vehicle weight rating), and manufacture date.

And, at the time of School Bus Voucher Redemption:

1. The completed NYSBIP Vehicle Scrappage Attestation (to be completed by the Purchaser and Vehicle Dismantler).
2. "After" photos of the school bus being scrapped (minimum image size of 1200 x 1800 pixels or 4 x 6 inches) and **submitted at the time of School Bus Voucher Redemption:**
  - **Engine destruction:** A photo of the three-inch hole cut or drilled into the engine block with the NYSBIP-supplier sticker or ruler from a few feet back that shows some of the color of the school bus.
  - **Side Picture of Destroyed vehicle:** A photo of the scrapped school bus from the side, showing the cab, and the front and rear axle. The DOT number or unique bus number should be visible in the photo, and the chassis should be clearly cut in half, with the hood open to display the destroyed engine. The engine hole does not need to be visible in this distance photo.

## 9.2 School Bus Voucher Redemption

Once an ESB has been purchased and delivered, the remaining unpaid balance (if any) has been paid by the Purchaser, scrappage of the replaced school bus has been completed (if applicable), and the purchased ESB is ready to be placed into service, the Dealer proceeds with School Bus Voucher Redemption. The Dealer completes the School Bus Voucher Redemption by returning to the [NYSERDA Portal](#) and submitting additional required documentation under the Milestones & Deliverables tab, including documentation on the scrapped school bus (if applicable). It is strongly encouraged that the Dealer ensures the scrappage of the old school bus is completed prior to initiating the School Bus Voucher Redemption.

### 9.2.1 School Bus Voucher Redemption Process

1. Once the ESB has been delivered to the Purchaser and the old school bus has been scrapped (if applicable), the Dealer may redeem a School Bus Voucher. To redeem a School Bus Voucher, the Dealer returns to the NYSERDA Portal and selects the appropriate project for the School Bus Voucher it wishes to redeem. A School Bus Voucher may include multiple ESB purchases for the same Purchaser. Each ESB will constitute its own “milestone” within the redemption process for a given School Bus Voucher. Dealers may request payment for some or all ESBs that are part of a single School Bus Voucher at a time.
2. The Dealer supplies additional ESB information:
  - New ESB license plate number
  - New ESB VIN (via OEM/URM Plate or VIN Plate)
  - Date new ESB was placed In-Service
  - Date of old school bus scrappage (if applicable)
3. The Dealer is required to upload the following documentation:
  - Signed final invoice/vehicle purchase order – must show the final purchase price with the School Bus Voucher amount and any other additional incentive funding subtracted.
  - Financial documentation (proof of payment) – copy of check or money/wire transfer.
  - NYS Department of Motor Vehicles Registration or Vehicle Registration / Title Application (form MV-82) for new ESB.
  - Photos of new ESB, VIN tag, and front of the ESB showing the license plate.
  - Copy of new ESB registration.
  - Scrappage documents, if applicable (check section 9.1.1).

*Note: A significant amount of the information required to redeem a School Bus Voucher will need to be supplied by the Purchaser. The Dealer is responsible for obtaining this documentation from the Purchaser*

*for the School Bus Voucher Application. If the Dealer cannot provide the documentation required to redeem a School Bus Voucher, even if such documentation is unavailable through no fault of the Dealer, no payment will be made on the School Bus Voucher. It is recommended that Dealers consider this obligation when entering purchase contracts with the Purchaser to ensure their ability to receive this documentation from the Purchaser.*

4. NYSERDA and the VHC will review the submitted information for completeness and eligibility. If the School Bus Voucher Redemption submission is deemed complete and valid, NYSERDA will approve the submission. The VHC will then inform the Dealer of School Bus Voucher Redemption approval. If the School Bus Voucher Redemption submission is incomplete or inaccurate, the VHC will inform the Dealer of incomplete or inaccurate redemption documentation and the Dealer will have fifteen (15) calendar days to correct, complete, and resubmit the documents for approval.

**If Voucher Redemption is Denied:** If a School Bus Voucher Redemption submission is denied, NYSERDA or the VHC will email the Dealer detailing the reasons that disqualify the School Bus Voucher Redemption submission.

**Appeals for Voucher Redemption Denials:** NYSERDA will consider appeals to the denial of a School Bus Voucher Redemption submission on a case-by-case basis and at its sole discretion. To submit an appeal, contact the VHC. NYSERDA is in no way obligated to consider an appeal.

5. Within thirty (30) calendar days of NYSERDA approval of the School Bus Voucher Redemption submission, NYSERDA will pay the School Bus Voucher amount to the Dealer, in accordance with the Prompt Payment Policy, also described in Exhibit B to the Dealer Participation Agreement.

## 9.2.2 School Bus Voucher Extension

A School Bus Voucher must be redeemed within fifteen (15) months of the voucher approval date as shown in the email the Dealer receives when the School Bus Voucher Application is approved. At any point within that period, a Dealer may request a School Bus Voucher extension by sending an email, with supporting documentation from the Manufacturer that shows the expected completion date, to the VHC. The email should indicate the expected date of ESB delivery. A copy of the current registration and DOT inspection report may also be requested to ensure the school bus to be scrapped is still in service. School Bus Voucher extensions are available for up to an additional six months (180 days). A School Bus Voucher that is not extended or redeemed within fifteen (15) months will be deemed expired and canceled. Extensions may be granted solely at NYSERDA's discretion and are not guaranteed to be approved. If granted, the School Bus Voucher extension approval will be sent via email from the VHC and will contain the School Bus Voucher's new expiration date, no later than twenty-one (21) months from the date of original School Bus Voucher approval. The Dealer is responsible for awareness of this date. If a School Bus Voucher is not redeemed and is canceled, a Dealer may reapply to NYSBIP for the same ESB with a new Voucher Application if the ESB has not yet been delivered, subject to the availability of funds.

### 9.3 School Bus Voucher Payment Process

School Bus Vouchers will be issued to Dealers via electronic payment. To sign up for electronic payment, Dealers must complete NYSEERDA's [EFT Bank Information and Authorization Form](#). Per NYSEERDA's Prompt Payment Policy, payments to Dealers can be expected within 30 days of School Bus Voucher Redemption approval.

A School Bus Voucher will not be issued if the Purchaser returns the ESB prior to the School Bus Voucher payment being issued. Dealers must notify the VHC if an ESB is returned and request the School Bus Voucher be canceled.

Furthermore, NYSEERDA reserves the right to seek reimbursement from the Dealer if the Purchaser returns the ESB to the Dealer within thirty (30) days of School Bus Voucher payment.

# 10 Charging Voucher Application and Approval

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## 10.1 Verify Equipment Requirements

Purchasers shall work with their ESB Dealer to determine which Chargers are compatible with their purchased ESBs and meet the requirements listed in section 3.2. Eligible Charging Costs funded by NYSBIP must follow all requirements set forth in the Implementation Manual. Note: Purchased ESBs do not necessarily need to receive NYSBIP funding for a Purchaser to apply for a Charging Voucher. If the ESBs are not receiving NYSBIP funding, additional documentation will be required (check section 10.2).

## 10.2 Charging Voucher Application Process

**For Purchasers that have identified their chargers and have completed a Fleet Electrification Plan (if applicable) at the time of application:**

1. Access the [NYSBIP Charging Voucher Portal](#) to create an account.
2. Once you have created an account, sign into the [NYSBIP Charging Voucher Portal](#) to start a Charging Voucher Application.
3. If the chargers are linked to ESBs receiving incentives from other programs, answer the additional questions. You will be asked to provide the award letter you received during the document upload page of the application.
4. Enter project data. This includes the project contacts Fleet Electrification plan information (if applicable).
5. Enter charger data. This includes number of chargers, manufacturer, model, number of ports, and location.
6. Upload supporting documents, including a Fleet Electrification Plan if applicable. (refer to section 3.1.1)
7. Accept Terms and Conditions and submit Charging Voucher Application.

**For Purchasers that have not identified chargers or completed a Fleet Electrification Plan at time of application:**

1. Access the NYSBIP Charging Voucher Portal to create an account.
2. Once you have created an account, sign into the NYSBIP Charging Voucher Portal to start a Charging Voucher Application.
3. Enter project data.
4. Enter charger data. The number of chargers is the only information required at this time.
5. Upload supporting documents.
6. Submit application for pre-approval.
7. NYSERDA will review and pre-approve the application to reserve Charging Voucher funds. Purchasers who are not submitting a Fleet Electrification Plan have sixty (60) days to re-enter the [NYSBIP Charging Voucher Portal](#) and complete remaining project data (manufacturer, model, number of ports) for full Charging Voucher approval.

Purchasers who are submitting a Fleet Electrification Plan have one hundred eighty (180) days to re-enter the [NYSBIP Charging Voucher Portal](#) and complete remaining project data, including the Fleet Electrification Plan.

8. Submit application for final approval.

### 10.3 Charging Voucher Approval

NYSERDA and the VHC will review the Charging Voucher Application for eligibility, accuracy, and completeness. If the Charging Voucher Application is incomplete or inaccurate, the VHC will notify the Purchaser that they must resubmit the required information. If the Charging Voucher Application includes additional incentives associated with the completion of a Fleet Electrification Plan, NYSERDA and the VHC will review the submitted documents to determine whether the Fleet Electrification Plan meets the NYSBIP requirements (check section 3.1). If not, the Purchaser will follow the procedures in section 3.1.1 to amend the Fleet Electrification Plan. For applications that are pre-approved, submission of make and model of Chargers to be installed must be uploaded to the application within sixty (60) days of pre-approval. Pre-approval will reserve Charging Voucher funds for sixty (60) days. If submission of required additional information is not received within sixty (60) days, NYSERDA will cancel the application. Charging applications can be re-submitted.

If a Purchaser completes a Fleet Electrification Plan after pre-approval of the Charging Voucher, the Purchaser must submit the completed plan to the application within one hundred eighty (180) days of pre-approval. Pre-approval will reserve Charging Voucher funds for one hundred eighty (180) days. If submission of required additional information is not received within one hundred eighty (180) days, NYSERDA will cancel the application. Charging applications can be re-submitted.

Based on the information submitted NYSERDA will determine the maximum amount of the Charging Voucher. Purchasers who complete a Fleet Electrification Plan or serve a Priority District may be entitled to a larger voucher.

Once NYSERDA determines the Charging Voucher Application is complete and meets all applicable requirements, the VHC will notify the Purchaser of approval.

# 11 Charging Voucher Redemption

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## 11.1 Charging Infrastructure Installation

Once a Purchaser's Charging Voucher Application has been approved, it may install the Charging Infrastructure itself or hire an Installer to do so. The Charging must be installed, and the voucher redeemed, within 15 months of the Charging Voucher Application approval. Charging Infrastructure must be installed after the date of approval of the Charging Voucher Application. During Installation, it is important for the Purchaser to collect the necessary documentation to claim reimbursement from their Charging Voucher (section 11.2.1.1). Purchasers are encouraged to work with experienced charging operators and/or design, engineering, and construction companies to install the Charging Infrastructure. In-house engineers may be able to oversee or install lower power Chargers where significant electrical upgrades are not required but help from the above parties is strongly encouraged. All projects funded with Bond Act proceeds, including NYSBIP funded Installations, must comply with the prevailing wage requirements found in Section 220 of the New York Labor Law.

All proposed Installations should also be reviewed by New York State Education Department (NYSED) to ensure compliance and eligibility for State Aid reimbursement.

## 11.2 Charging Voucher Redemption

### 11.2.1 Charging Voucher Redemption Process

1. Once the Charging Voucher has been approved and the Charger(s) are installed and placed in service, the Purchaser may redeem their Charging Voucher. A Charging Voucher must be redeemed within fifteen (15) months of the Charging Voucher Application approval. To redeem a Charging Voucher, the Purchaser must go to the NYSBIP Charging Voucher Portal and select the appropriate Charging Voucher project for redemption. The Purchaser then uploads all remaining documents and deliverables for one or more Chargers (refer to section 11.2.1.1) and submits for Charging Voucher Redemption. A Charging Voucher may include multiple Chargers for the same Purchaser. Purchasers may request payment for some or all Chargers that are part of a single Charging Voucher at a time.
2. NYSERDA and the VHC will review the submitted information for completeness and eligibility. If the Charging Voucher Redemption submission is deemed complete and valid, NYSERDA will approve the submission. The VHC will then inform the Purchaser of the Charging Voucher Redemption approval. If the Charging Voucher Redemption submission is incomplete or inaccurate, the VHC will notify the Purchaser. The Purchaser will have thirty (30) calendar days from the date of notice to correct, complete, and resubmit the documents for approval. If the errors are not corrected within the thirty (30) day timeframe, the Charging Voucher will be cancelled, and any reserved funds will be released.



3. If a Charging Voucher is canceled, a Purchaser may reapply to NYSBIP for the same Charger with a new Charging Voucher Application.
4. If Charging Voucher Redemption is Denied: If a Charging Voucher Redemption submission is denied, NYSEDA or the VHC will email the Purchaser detailing the reasons that disqualify the submission.
5. Appeals for Charging Voucher Redemption Denials: NYSEDA will consider appeals to the denial of a Charging Voucher on a case-by-case basis and at its sole discretion. To submit an appeal, contact the VHC. NYSEDA is in no way obligated to consider an appeal.
6. Within thirty (30) calendar days of NYSEDA approval of the Charging Voucher Redemption submission, NYSEDA will pay the Charging Voucher amount to the Purchaser, in accordance with the Prompt Payment Policy.

#### *11.2.1.1 Required Documentation for Redemption*

1. Date new Charger was placed in service.
2. Charger product specification Sheet(s).
3. Serial numbers and address for all Charging Infrastructure.
4. Copy of Permit: Scan of building permit to install Charging Infrastructure or note from the authority having jurisdiction (AHJ) that no building permit is required.
5. Installed Site Photo: Photo of the Charging Infrastructure installed so the equipment is visible at its site.
6. Site Host Agreement: Scan of signed Site Host Agreement, synchronized with the 5-year in-service requirement. If the Purchaser is also the site owner, the Purchaser must still complete this form.
7. Charging Infrastructure Installer Certification: Scan of signed Installer Certification. If the Charging Infrastructure is self-installed, the Charger Owner Purchaser will still complete this form.
8. Itemized Invoice for Charging Infrastructure: Scan of proof of payment for the Charging Equipment and Installation. The proof of payment for the Charging Equipment and Installation should list information about the vendor and installer (name, company, contact information), and include an itemized invoice that clearly breaks out the following:
  - a. Make and model name of the specific Charger(s) purchased with per-unit costs.
  - b. Networking fees (if applicable).
  - c. Other fees, such as provisioning fees (if applicable).

**Note:** NYSEDA requests networking and other fees, if applicable to ensure that the proof of payment is for the Charger(s) and no other associated costs.
  - d. Labor costs associated with the Installation of Charger(s) if the Purchaser is seeking reimbursement of those costs through NYSBIP (hourly rates and number of hours at each rate). Labor associated with electric service upgrades must be listed separately.
  - e. Materials and hardware other than the Charger, such as electrical conduit (linear feet) and wiring (please itemize).
  - f. Electric service upgrades such as panels, meters, and transformers.

**Note:** only Customer-Side “Make-Ready” Equipment costs are eligible for reimbursement.

- g. Site work directly related to the Charger installation, such as patching pavement that had to be torn up to install conduit and concrete slabs for the Installation.

NYSERDA reserves the right to require additional documentation if needed for verification of any element of Charging Voucher eligibility.

### 11.2.2 Charging Voucher Extension

A Charging Voucher must be redeemed within fifteen (15) months of the date shown in the email that the Purchaser receives from NYSERDA approving the Charging Voucher Application. At any point within that period, a Purchaser may request a Charging Voucher extension by sending an email, with supporting documentation that shows the expected completion date and reason for delayed project completion, to the VHC. The email should indicate the expected date of Charging Infrastructure delivery and Installation. Charging Voucher extensions of up to twelve (12) months are available under certain circumstances (ex. equipment delays, utility connection delays, revision of Fleet Electrification Plan). A Charging Voucher that is not extended or redeemed within fifteen (15) months will be deemed expired and canceled. Extensions may be granted solely at NYSERDA’s discretion. If a Charging Voucher is canceled, a Purchaser may reapply to NYSBIP for the same Charger with a new Charging Voucher Application if the associated Charging Infrastructure has not yet been installed, subject to the availability of funds.

## 11.3 Charging Voucher Payment Process

Charging Voucher payments will be issued to Purchasers via electronic payment. NYSERDA will provide the Purchaser with a Supplier Identification Number, which the Purchaser will use to complete an [Electronic Fund Transfer \(EFT\) Authorization Form](#). Per NYSERDA’s Prompt Payment Policy, payments to Purchasers can be expected within thirty (30) days of Charging Voucher Redemption approval.

A Charging Voucher will not be issued if the Purchaser returns the Charging Infrastructure prior to the Charging Voucher payment being issued. The Purchaser must notify the VHC if the Charging Infrastructure was returned and request the Charging Voucher be canceled.

# 12 Operating and Reporting Requirements

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## 12.1 Operating Requirements

School District Purchasers are required to own and operate ESBs and Charging Infrastructure purchased with support from NYSBIP for no less than five (5) years after School Bus Voucher Redemption and Charging Voucher Redemption. This requirement applies to both new ESBs and Repowered School Buses.

Third-Party Operator Purchasers must own and operate ESBs and Charging Infrastructure, in the service of a New York State school district, for five (5) years. The five-year period begins on the date that the School bus and/or Charging Voucher Redemption is executed. If, within five (5) years of the Voucher execution, the School Bus and/or Charging Agreement (i) expires and no new Agreement with the same school district is entered into, or (ii) is terminated, the Third-Party Operator must use the ESBs and Charging Infrastructure in service of another school district in New York State (a “successor school district”) for the remainder of the five (5) year period (refer to the Third-Party Operator Addendum for more information).

ESBs receiving NYSBIP incentives must be continuously registered and domiciled in New York State. The minimum annual usage requirement for ESBs is 5,000 miles per year during each year of the five-year own and operate period. Any ESB or Charging Infrastructure sold or retired before the required minimum five years is subject to a prorated reimbursement penalty of 1.667% per month.

The primary usage of the ESBs and Charger Infrastructure must be the transportation of students, teachers, and other persons acting in a supervisory capacity to and from school, extra-curricular activities, sporting events, field trips, and similar activities on behalf of a New York State school district. Use of the ESBs and Chargers for other purposes is limited to incidental usage and may not result in more than an incidental private benefit to the Purchaser. Each such incidental use must be approved by NYSERDA, which may limit any other use to ensure not more than an incidental private benefit to the Purchaser. The mileage driven for incidental usage on an ESB in any year of the 5-year in-service period may not exceed 5% of the miles driven by the ESB in such year.

The associated Chargers incentivized by NYSBIP shall only be used to charge ESBs. For Third-Party Operators, Chargers shall only be used to charge ESBs used to serve the school districts with which the Third-Party Operator has a School Bus Agreement.

If the Purchaser changes Network Services Vendors or replaces the Charging Infrastructure within the required five (5) year period of operation, the Purchaser is responsible for notifying the Program Administrator and for providing new supporting documentation as described in the Implementation Manual within 30 days of the change.

## 12.2 Reporting Requirements

Purchasers are required to submit ESB and Charger Usage Reports for NYSERDA that document the use of ESBs and Chargers, and operating costs of funded ESBs and Chargers. An individual Purchaser's information will not be made available to the public and is intended solely for NYSERDA's tracking of program analytics; any information released publicly will be aggregated among multiple Purchasers. An ESB and Charger Usage Report form will be provided by NYSERDA. It contains several basic questions about ESB and Charger operation experience, including information on ESB mileage, electricity use, maintenance issues, and ESB location.

The School Bus Voucher reports must be submitted once a year and Charging Voucher reports must be submitted quarterly for five (5) years following School Bus Voucher Redemptions and Charger Voucher Redemption of each ESB and Charger funded through the program.

- ESBs funded under NYSBIP must report ESB odometer readings, the amount of electricity used for battery charging (kWh) for the applicable reporting period, and for cumulative reporting. NYSERDA may obtain this data from network providers if applicable.
- ESBs funded under NYSBIP must report maintenance and repair information, including associated costs, related to the ESB for the applicable reporting period and cumulative reporting. Vehicle down time due to maintenance and repair needs shall be included. Purchasers/Vehicle Operators must also provide maintenance and repair reporting for similar diesel-powered ESBs in enough detail to allow a technical evaluation.

Purchasers must collect feedback from drivers/users of ESBs and Chargers funded under NYSBIP each reporting period. Feedback will include any issues, positive or negative, on the ESB driving experience, and the experience with Chargers.

Failure to submit ESB and Charger Usage Reports in a timely, accurate manner for the required five-year term is a violation of the terms and conditions of the NYSBIP funding and may result in the Purchaser being subject to a prorated reimbursement penalty based on the number of missed reports as well as a ban from any further participation in NYSBIP or other NYSERDA programs.

### 12.2.1 ESB Reporting Process

Data will be collected in November of each year, with notifications sent to Purchasers in October. To complete the Vehicle Usage Report, Purchasers will need at a minimum:

- Vehicle Identification Numbers (VINs) for purchased ESBs.
- Drive cycle, range, and location information.
- Fuel consumption and mileage information.
- Maintenance cost information.
- Infrastructure or capital investment information (e.g., in fueling facilities).

Purchasers should contact the VHC with any questions or for assistance with the Vehicle Usage Report.

## 12.2.2 Charger Reporting Process

Detailed charging data about each charging session can typically be downloaded through a web-based portal or an app for networked Chargers. Some networked Chargers may be able to provide data directly to NYSERDA by granting NYSERDA direct access to the web-based portal. Charging reports should contain, at a minimum:

- Session data
- Charging data
- Charger serial number
- Total energy provided (kWh)
- Peak power (kW)
- Port identifier, if applicable (dual port chargers)

Additional reporting elements may be added to the Program for those Chargers capable of V2G charging.

The Purchaser shall provide all data requested on, at least, quarterly basis to NYSERDA either via access to network software or by completing via access to a network software portal or by completing NYSERDA's [Charging Usage Report template](#) for the duration of the five (5) years. The Program Administrator will be able to provide instructions to the Purchaser for establishing NYSERDA as an administrator with data access if that track is chosen. NYSERDA may also survey Purchasers to obtain information regarding additional topics, including, but not limited to, parts availability, warranty service, maintenance, and repair issues.

## 12.2.3 Telematics

NYSERDA may require the use of telematics of NYSERDA's choice and at NYSERDA's expense. Purchasers will be given access to the data for their ESBs with the required telematics installed. Full details can be found in the [Purchaser Participation Agreement](#) and the [Third-Party Operator Addendum](#).



**NYSERDA**

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

17 Columbia Circle  
Albany, NY 12203-6399

**toll free:** 866-NYSERDA  
**local:** 518-862-1090  
**fax:** 518-862-1091

[info@nyserda.ny.gov](mailto:info@nyserda.ny.gov)  
[nyserda.ny.gov](http://nyserda.ny.gov)