

# New York School Bus Incentive Program

## Implementation Manual

December 2024, Version 5



NEW  
YORK  
STATE

**NYSERDA**  
Clean Transportation

# Table of Contents

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<b>List of Tables and Figures .....</b>	<b>3</b>
<b>Definitions for NYSBIP .....</b>	<b>3</b>
<b>1 Program Overview .....</b>	<b>11</b>
1.1 About the Program .....	11
1.2 About the Implementation Manual .....	12
1.3 General Program Rules .....	12
1.3.1 Voucher Publicity .....	13
1.3.2 Voucher Stacking .....	13
1.3.3 Program Contacts .....	15
<b>2 School Bus Voucher Requirements and Amounts .....</b>	<b>16</b>
2.1 Base School Bus Voucher Amounts .....	16
2.2 School Bus Voucher Rules .....	17
2.3 School Bus Voucher Bonus Amounts .....	17
2.3.1 Priority District Bonus .....	18
2.3.2 Scrappage Bonus .....	18
2.4 Complementary School Bus Voucher Add-Ons .....	20
2.4.1 Vehicle-to-Grid Technology Add-On .....	20
2.4.2 Wheelchair Accessibility Add-On .....	20
2.5 School Bus Voucher Caps .....	21
2.6 Declining School Bus Voucher Incentives .....	22
<b>3 Charging Voucher Requirements and Amounts .....</b>	<b>23</b>
3.1 Charging Voucher Amounts .....	23
3.1.1 Fleet Electrification Plan Requirements .....	23
3.2 Charging Voucher Rules .....	25
3.2.1 Visiting ESB Charging Voucher for BOCES Purchasers .....	25
3.3 Eligible Charging Costs .....	27
3.3.1 Eligible Charging Infrastructure and Installation Costs .....	27
3.3.2 Requirements for Charging Infrastructure .....	28
3.3.3 Charger Requirements .....	29
<b>4 NYSBIP Process .....</b>	<b>31</b>
4.1 School Bus Voucher Process .....	31
4.2 Charging Voucher Process .....	33
<b>5 School Bus Eligibility and Approval .....</b>	<b>35</b>

5.1	School Bus Eligibility Requirements.....	35
5.2	ESB Approval Process.....	35
<b>6</b>	<b>Dealer Eligibility and Approval .....</b>	<b>37</b>
6.1	Dealer Eligibility Requirements.....	37
6.2	School Bus Dealer Approval Process.....	37
6.3	School Bus Dealer Requirements.....	38
<b>7</b>	<b>Purchaser Eligibility .....</b>	<b>39</b>
7.1	General Eligibility Requirements.....	39
7.1.1	Priority School District .....	39
<b>8</b>	<b>School Bus Voucher Application and Approval.....</b>	<b>40</b>
8.1	School Bus Voucher Application Process .....	40
8.2	School Bus Voucher Approval .....	41
<b>9</b>	<b>School Bus Voucher Scrappage and Redemption .....</b>	<b>42</b>
9.1	School Bus Scrappage .....	42
9.1.1	Required Scrappage Documents.....	43
9.2	School Bus Voucher Redemption.....	44
9.2.1	School Bus Voucher Redemption Process .....	44
9.2.2	School Bus Voucher Extension.....	46
9.3	School Bus Voucher Payment Process .....	46
<b>10</b>	<b>Charging Voucher Application and Approval .....</b>	<b>47</b>
10.1	Verify Equipment Requirements.....	47
10.2	Charging Voucher Application Process .....	47
10.2.1	Visiting ESB Charging Voucher Procedure (for BOCES).....	48
10.3	Charging Voucher Approval .....	49
<b>11</b>	<b>Charging Voucher Redemption .....</b>	<b>50</b>
11.1	Charging Infrastructure Installation.....	50
11.2	Charging Voucher Redemption .....	50
11.2.1	Charging Voucher Redemption Process.....	50
11.2.2	Charging Voucher Extension .....	52
11.3	Charging Voucher Payment Process .....	52
<b>12</b>	<b>Operating and Reporting Requirements.....</b>	<b>53</b>
12.1	Operating Requirements.....	53
12.2	Reporting Requirements.....	54
12.2.1	ESB Reporting Process .....	54

12.2.2	Charger Reporting Process.....	55
12.2.3	Telematics .....	55

## List of Tables and Figures

---

Table 1. NYSBIP School Bus Stacking Voucher Amounts .....	14
Table 2. Base School Bus Voucher Amounts.....	16
Table 3. School Bus Voucher Bonus and Add-On Amounts.....	17
Table 4. Priority District Bonus Amounts.....	18
Table 5. School Bus Scrappage Bonus Amounts .....	18
Table 6. V2G Technology Complementary Add-On Amounts.....	20
Table 7. Wheelchair Accessibility Add-On Amounts.....	20
Table 8. Maximum Charging Voucher Amounts .....	23
Figure 1. Utility- and Customer-Side "Make-Ready" Infrastructure Components .....	28
Figure 2. ESB Voucher Process Diagram for Each Stakeholder .....	31
Figure 3. Charging Voucher Process Diagram .....	33

## 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.

**BOCES Cap** refers to the number of charging ports that a Board of Cooperative Educational Services "BOCES" school can apply for, through the Charging Voucher, without purchasing an ESB as long as the Charger(s) are accessible to all school districts.

**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.

**District Cap** is the total amount of school bus vouchers a district may apply for by December 1, 2025. The District Cap is determined by the size and priority status of the district. When there is more than one provider serving a district (i.e., the district and/or Third-Party Operators), the District Cap applies to all providers (see: Sub-District Cap).

**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 (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 (FEP)** 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.

**Modified FEP** is a fleet electrification plan that specifically applies to BOCES that wish to install Charger(s) for visiting school districts to charge their electric school buses.

**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.

**Port** is the connection point between the charger and the vehicle where the charger is plugged in.



**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.

**Provisional Purchase Order** is a document that specifies the items, quantities, prices, and credit terms requested by the Purchaser for a purchase of ESBs from a Dealer. A Provisional Purchaser Order should include:

- Base price of the bus
- Line item summarizing custom bus specs requested by Purchaser
- Line item for the NYSBIP Voucher amount deducted
- Line item for charger (if applicable)
- Line item for costs associated with the charger (if applicable)
- Potential awards (if applying for EPA funding)

**Final Purchase Order** is the final version of the purchase order that will be executed. A Final Purchase Order should include:

- Base price of the bus
- Line item summarizing custom bus specs requested by Purchaser
- Line item for the NYSBIP Voucher amount deducted
- Deposit amount
- Line item for charger (if applicable)
- Line item for costs associated with the charger (if applicable)
- Final award amounts from other programs deducted (if applicable)
- Estimated delivery date

**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 NYSEDRA 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.

**Sub-District Cap** applies in districts where pupil transportation is provided by more than one party, including one or more Third-Party Operator and/or the district. The total number of School Bus Vouchers will be determined using the 'District Cap.' Additionally, each provider will also have a 'Sub-District Cap' that is determined by the share of vehicles they operate as part of the district's overall fleet.

**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.

**Visiting ESB Charging Voucher** is a Charging Voucher that BOCES Purchasers may apply for without initiating an ESB purchase for the purpose of charging visiting school districts' ESBs.

**Voucher Approval Date** is the date on which NYSERDA approved a project and sets aside funding for an ESB project. Dealers and Purchasers must submit all documentation for reimbursement within 15 months of the voucher approval date. NYSERDA 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. NYSEDA has established the New York School Bus Incentive Program (NYSEBIP) 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.

NYSEBIP 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. NYSEDA 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.

NYSEBIP 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 NYSEBIP 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 at 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 at 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, NYSEDA 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 NYSEDA. NYSEDA 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. NYSEDA 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

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

If the Purchaser and Dealer does not provide proper documentation for School Bus Voucher Redemption, NYSEDA 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.

NYSEDA 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 NYSEDA Eligible ESB List on the [NYSEDA website](#). This allows prospective Purchasers to know the estimated ‘base’ ESB incentive amount (before eligible bonuses or add-ons are applied, refer to section 2.1 for more information) prior to negotiating an ESB price with the Dealer. NYSEDA will determine and update Charging Voucher amounts on the NYSEDA website.

NYSEDA, 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 NYSEDA’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 NYSEDA. NYSEDA participants must notify the Voucher Help Center and NYSEDA Project Managers in advance of any media interview or press event in which work related to NYSEDA, including ESBs or Charger Infrastructure for which the purchase was facilitated using vouchers, is referred to or discussed. Purchasers must not use NYSEDA corporate name, logo, identity, any affiliation, or any related logo, without prior written consent from NYSEDA.

### 1.3.2 Voucher Stacking

NYSEDA 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 NYSEDA showing all other public incentives received/awarded for the ESBs and/or Charging Infrastructure. If it comes to NYSEDA’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, NYSEDA will reduce the NYSEDA award accordingly or request reimbursement of excess incentives if incentive payments have already been made.

### *1.3.2.1 U.S. Environmental Protection Agency Program Stacking*

NYSBIP incentives and U.S. Environmental Protection Agency (EPA) Program award funding may be stacked for the same vehicles.

Applications submitted on or after **July 1, 2024**, are eligible for incentives as outlined in Table 1, 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 EPA 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 Districts differ and the NYSBIP School Bus Stacking Voucher amount is determined by the EPA designations. If the EPA Program does not prioritize applications, the Voucher amount will default to EPA non-priority amount.

The NYSBIP School Bus Stacking Voucher is awarded on top of the amount awarded by the EPA 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 an EPA Program awards, this stacking approach results in a significantly higher total award amount than the standard NYSBIP incentive.

If a School Bus Operator receives an EPA 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

<b>Bus Type</b>	<b>EPA Priority District Stacking Amount</b>	<b>EPA Non-Priority District Stacking Amount</b>
Type A	\$50,000	\$100,000
Type C	\$50,000	\$100,000
Type D	\$50,000	\$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 NYSEDA project managers responsible for the Program:

**Hannah Abdoo**

Project Manager – School Bus Voucher

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)

**Sophie Patka**

Project Manager – Charging Voucher

15 Columbia Circle, Albany, NY 12203-6399

518-971-1090 x 3629

[Sophie.Patka@nyserda.ny.gov](mailto:Sophie.Patka@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

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. NYSEDA 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

\*Refer to 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 (refer to 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 refer to 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:** Refer to 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 at the date of application 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.
  - If a bus to be scrapped cannot meet the above mileage requirement, then Purchasers may scrap a bus that meets the following criteria:
    - engine model year ten (10) years or older from the current calendar year and;
  - Buses with an odometer reading over 110,000 miles
- 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. After December 1, 2025, Purchasers may apply for additional ESB Vouchers if funding remains. All Purchasers must submit a completed Fleet Certification at the time of application for NYSED to determine the following caps (refer to Section 8.1).

- District Caps
  - Each non-priority 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 (refer to section 3.1.1).
  - NYSBIP Stacking Vouchers (refer to Section 1.3.2.1) count toward the District Cap.
- Sub-District Caps
  - In districts where pupil transportation is provided by more than one party, including one or more Third-Party Operator and/or the district, the total number of School Bus Vouchers will be determined using the 'District Cap' guidelines above. Additionally, each provider will also have a 'Sub-District Cap' that is determined by the share of vehicles they operate (see 'Mixed Fleet Example' at the end of this section).
  - Each provider 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 provider may apply for the greater of ten (10) ESBs or 10% of its fleet serving each Priority District with which it contracts.
  - Providers 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.
  - For the purposes of the NYSBIP program, NYSED considers New York City (NYC) as one school district.
  - No district may receive more than 25% of total program funding.
  - NYSBIP Stacking Vouchers (refer to Section 1.3.2.1) count toward the District Cap.
  - Funding caps will remain in place until December 1, 2025, at which point NYSED will reassess based on program demand and geographic distribution of funding to date.
- Mixed Fleet Example:
  - School District A, a Priority District, requires 300 buses for pupil transportation (District Fleet = 300, District Cap = 30 School Bus Vouchers).



- School District A's pupil transportation is provided by Third-Party A (200 buses), Third-Party B (70 buses), the District (30 buses), so the Sub-District Caps are:
  - Third-Party A = up to 20 School Bus Vouchers
  - Third-Party B = up to 10 School Bus Vouchers
  - School District A = up to 10 School Bus Vouchers
- While the sum of the Sub-District Caps is 40 School Bus Vouchers, the District Cap is 30 School Bus Vouchers. If School District A wants to claim all 30 School Bus Vouchers, it must coordinate with its Third-Party Operators to stay within the District Cap. This coordination is documented and approved by the district and the Third-Party Operator by completing the Third-Party Operator Addendum (refer to Section 8.1).

These caps will be reviewed and, if funding allows, lifted, once efforts to reach every school district have been made.

## 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 decreases. NYSED 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

### 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

	Base Voucher Amount	With Fleet Electrification Plan
Non-Priority District	\$25,000 per bus	\$55,000 per bus
Priority District	\$35,000 per bus	\$65,000 per bus

#### 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 not completed through NYSERDA must meet the most recent requirements as posted on NYSERDA's [Fleet Electrification Planning](#) webpage. Fleet Electrification Plans typically include the following items, although there may be variations based on the specific needs of the Purchaser as well as the service offerings of the chosen consultant.

- **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. The Utility Assessment should also include a rate analysis (to be completed by the utility as available) which summarizes the rates and rebates available and is included in the final cost estimates.
- **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. The charging strategy will also indicate the potential savings associated with the use of a Charge Management System (CMS) or similar load management software.
- **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. Cost estimates should also include an assessment of the possible savings associated with available incentives at the time of the written report. The rate analysis (completed by the utility as available) will also be included in the cost estimates and phasing plan.

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 Charging Voucher Rules

- 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.
- NYSEDA 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.

### 3.2.1 Visiting ESB Charging Voucher for BOCES Purchasers

BOCES Purchasers may apply for Charger(s) without initiating an ESB purchase, for the purpose of charging visiting school district ESBs. To qualify for the Visiting ESB Charging Vouchers, the BOCES Purchasers must adhere to the following requirements:

- Charger(s) must be accessible to all school districts.
- BOCES Purchasers must complete a Modified FEP through NYSEDA (refer to Section 3.2.1.1 for all the Modified FEP requirements). A complete Modified FEP qualifies a BOCES applicant for the Fleet Electrification Plan Bonus (refer to section 3.1.1).
- Each BOCES has a BOCES Cap of 10 Ports, which can be installed at one (1) or more locations. For example, a BOCES Purchaser can choose to install all ten (10) Ports worth of Chargers at a single location or can install two (2) Ports worth of Chargers at location A and eight (8) Ports worth of Chargers at location B. The ten (10) Ports do not need to be applied for at one time.

- Each port must be capable of dispensing a minimum of 60kW. For multi-port chargers, each port must be able to simultaneously charge at a minimum rate of 60kW per port. Please note that the BOCES Cap is separate from the District Cap.
- BOCES applicants can access the Priority District Bonus if the location where the chargers are installed is in a DAC.
- The Charger(s) must be networked. *NYSERDA does not cover the cost of networking fees or for any associated subscriptions.*
- A Payment system must be included and there must be a backup form of payment available (i.e. QR code, toll free number). *The BOCES Purchaser may allow school districts to charge their buses without charge and may allow members of the public to use the Charger(s), if desired.*
- All other Charging Infrastructure and Charger Requirements must be adhered to (refer to Section 3.3).

### *3.2.1.1 Modified Fleet Electrification Plan Requirements*

The Modified FEP requirements are specifically for BOCES Purchasers looking to install chargers for use by visiting school districts. The Modified FEP is focused on assessing the frequency and volume of visiting school buses, the duration of the bus layover on BOCES property, the charging requirements of visiting buses, and the electrical and site upgrades necessary to support the chargers on site.

A Modified Fleet Electrification Plan typically includes the items detailed in Table 10, although there may be variations based on the specific needs of the BOCES Purchaser as well as the service offerings of the chosen consultant. Modified FEPs.

- **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.
- **Visiting Bus Analysis:** Analysis of the time and distance involved in each visiting bus route, which is necessary to understand the power requirements of the chargers. The analysis will define the frequency of visiting buses, the duration of bus layovers, 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. The Utility Assessment should also include a rate analysis (to be completed by the utility as available) which summarizes the rates and rebates available and is included in the final cost estimates.
- **Charging Strategy:** Development of a charging strategy that includes Charger power ratings and quantities and expected charging times throughout the day. Given the variable nature of BOCES support charging, the charging strategy will anticipate when chargers will need to be used by visiting buses and provide recommendations to maximize the number of buses that can be charged during layovers. If applicable, the charging strategy will also estimate the use of the chargers by the public and define rules to ensure school buses have priority at chargers.

- **Phasing Plan:** Development of a phasing plan identifying necessary capital works projects and phased plan for Charger Installation. This phasing plan should include a schedule and transition cost estimate for Utility upgrade/sitework and Charger purchases. Cost estimates should also include an assessment of the possible savings associated with available incentives at the time of the written report, as well as any potential revenue from the chargers if applicable. The rate analysis (completed by the utility as available) will also be included in the cost estimates and phasing plan.

A BOCES Purchaser that owns buses and wishes to complete both a Fleet Electrification Plan and a Modified Fleet Electrification Plan may do so under one NYSERDA contract, but must clearly define the additional tasks associated with the BOCES support charging and speak with the NYSERDA Project Manager about the best way to complete both studies.

To get started on a Modified FEP, reach out to [schoolbus@nyserda.ny.gov](mailto:schoolbus@nyserda.ny.gov).

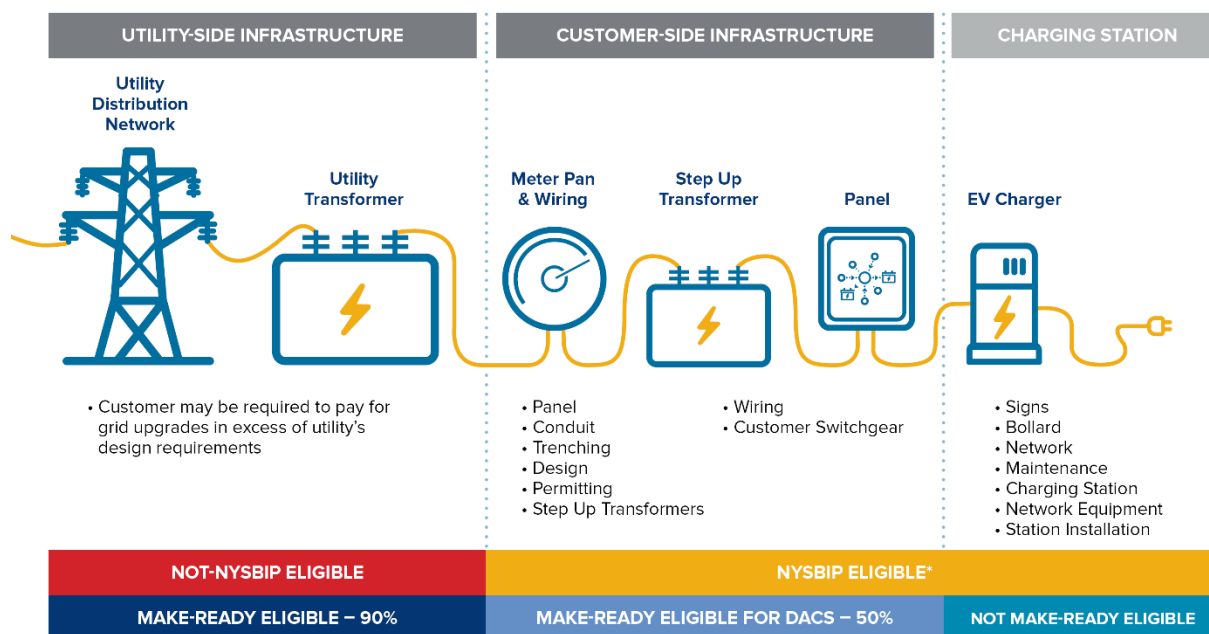
## 3.3 Eligible Charging Costs

### 3.3.1 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 covers bondable items. Signs, bollards, network, maintenance, etc. are not eligible.

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

### 3.3.2 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 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.

### 3.3.3 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 ENERGY STAR®-certified, indicating that the below requirements are met:
  - Must be certified by a Nationally Recognized Testing Laboratory (NRTL) recognized by the United States Occupational Safety and Health Administration (OSHA). A complete list of certified charging equipment is on the ENERGY STAR Certification's [website](#).
- NYSEDA recommends that Chargers be networked for charge management and data reporting purposes. However, at this time networking is not required, unless the Charger(s) are for the Visiting ESB Charging Voucher (refer to section 3.2.1). 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.
  - Proprietary network software may be used if the Charger can switch to another OCPP compliant network provider at the end of any contract agreement.
  - NYSEDA 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.
- 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.
- NYSDERDA may require new applicants comply with ISO 15118 Hardware and Software Parts 3, 2, and 20 at a later date. In such event, this Manual will be updated to include those requirements.

## 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. Refer to section 5 for details on ESB eligibility requirements and process.
2. **Dealer Approval** – A Dealer authorized to sell an eligible ESB applies to NYSERDA to become an approved Dealer applying through the [Contractor Portal](#) (refer to 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 NYSERDA.
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. Submission of a Provisional Purchase Order showing the full School Bus Voucher amount deducted from the final sale price of the ESB is required. The Purchaser and the Dealer are also required to report the date that the ESBs will be voted on (if applicable) (refer to section 8 for details on the School Bus Voucher Application process).
4. **School Bus Voucher Application Approval** – The VHC and NYSERDA 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 NYSBIP funding. Repowered School Buses must have their retrofits completed after the date of the School Bus Voucher Application to be eligible for NYSBIP funding.
5. **School Bus Voucher Redemption** – No later than four (4) months from the application approval date, the Dealer must submit any award letters from other incentive programs that the Purchaser receives for the bus(es) in the application. No later than nine (9) months from the application approval date, the Dealer must submit a Final Purchase Order in the NYSERDA Portal. 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 [NYSERDA Portal](#). This consists of uploading all required documentation for final approval (refer to 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 18 months of the School Bus Voucher Application approval date. NYSERDA can approve extensions of up to 6 months (refer to 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 [NYSERDA 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 (refer to section 9.1 for details of the scrappage process and documentation).

6. **School Bus Voucher Payment** – The VHC and NYSDERDA review the School Bus Voucher Redemption documents, and if all documents are approved, NYSDERDA 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](#) (refer to 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 (refer to 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 (refer to 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](#) (refer to 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](#), NYSERDA 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 NYSERDA'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 NYSEDA), 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 NYSEDA for ESBs to be eligible to receive NYSEIP incentives.

Proof of a guaranteed warranty for motor, powertrain, parts, and labor for the minimum amount of time specified (refer to section 5.1). NYSEDA and the VHC review the [ESB Eligibility Application](#) and additional documentation for accuracy and completeness. If additional information is needed, NYSEDA or the VHC will notify the Dealer via email. If NYSEDA or the VHC find that the application is complete, and the ESB(s) are eligible, the Dealer will be notified of approval.

3. NYSEDA will list all eligible ESB(s) on the [Eligible ESB List](#), which can be found on NYSEDA's [NYSEIP website](#), so Purchasers know which ESB(s) they can purchase through NYSEIP.

## 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 NYSEDA for review.
6. NYSEDA 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, NYSEDA will notify the Dealer that they are now an approved Dealer. This approval will create an account for the Dealer in the [NYSEDA Portal](#).

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

## 6.3 School Bus Dealer Requirements

Dealers are required to pass on the full NYSEBIP 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 NYSEBIP-related records available for review by NYSEDA during the first five (5) years after the School Bus Voucher Redemption is complete on the ESB(s) that receive support through NYSEBIP.

## 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 (refer to 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. Answer the fleet size and public vote date questions.
3. Enter domicile address(es).
4. Enter Utility Provider.
5. Select Eligible Vehicle(s) to be purchased.
6. Enter details of new ESB(s) and school bus(es) to be scrapped (if applying for the Scrappage Bonus).
7. Agree to the NYSBIP terms and conditions.
8. Upload the following documents:
  - Signed [Purchaser Participation Agreement](#)
  - Signed Fleet Certification
  - Signed [Third-Party Operator Addendum](#) (if the Purchaser leases the vehicle to a different entity).
  - Provisional Purchase Order for new ESB(s) (may be a Final Purchase Order, see section 9.2.1). The Provisional Purchase Order must include:
    - Base price of the bus
    - Line item summarizing custom bus specs requested by purchaser
    - Line item for the NYSBIP Voucher amount deducted
    - Line item for charger (if applicable)
    - Line item for costs associated with the charger (if applicable)
    - Potential awards (if applicable, applying for EPA awards)
  - Scrappage documents if applicable (refer to section 9.1.1).
9. Submit the School Bus Voucher Application.

*NYSERDA recommends that Dealers/Purchasers submit their application 1-2 months prior to having your school board vote so that NYSERDA has time to review and issue a provisional award letter.*

## 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, an award letter is generated with the voucher amount and approval date. 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:**

- If a Purchaser is scrapping a bus for the first time, NYSEDA requests that the Purchaser reach out to the Voucher Help Center via email (NYSBIP@energycenter.org) 1-2 months before intended scrappage date to be paired with a Scrap Auditor. The Scrap Auditor will assist the Purchaser with scheduling the scrap event and will attend the event to monitor the scrap event for program compliance and collect all the required documentation. A Purchaser representative must still be present to sign the Scrappage Attestation.
- Scrappage must be performed by a participating Vehicle Dismantler; a current list of participating Vehicle Dismantlers is available on the NYSEDA 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 NYSEDA.

- 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. At least the previous two (2) DOT Inspection Records demonstrating that the scrap bus has reached the mileage requirements (refer to section 2.3.2.1).
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

Dealers must complete Voucher redemption within eighteen (18) months of the application approval date. During this time the following activities must occur:

- A Final Purchase Order is generated and executed.
- The Dealer delivers the new ESB(s) to the Purchaser.
- The Purchaser accepts the ESB(s) and puts them in operation.
- The Purchaser pays the remaining unpaid balance (if any) to the Dealer.
- The Purchaser scraps their approved vehicle and collects the necessary documentation (if applicable, refer to section 9.1.1).

The Dealer completes the School Bus Voucher Redemption by returning to the [NYSERDA Portal](#) and submitting additional required documentation under the Milestones & Deliverables tab.

### 9.2.1 School Bus Voucher Redemption Process

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 Application at a time. To redeem a School Bus Voucher:

1. Within four (4) months of the application approval date, the Dealer must submit any award letters from other incentive programs that the Purchaser receives for the bus(es) in the application. The Dealer submits these documents in the NYSERDA Portal (if applicable).

2. Within nine (9) months of the application approval date, the Dealer must submit a Final Purchase Order in the NYSERDA Portal. The Final Purchase Order must include:
  - Base price of the bus
  - Line item summarizing custom bus specs requested by purchaser
  - Line item for the NYSBIP Voucher amount deducted
  - Deposit amount
  - Line item for charger (if applicable)
  - Line item for costs associated with the charger (if applicable)
  - Final award amounts from other programs deducted (if applicable)
  - Estimated delivery date
3. Within eighteen (18) months of application approval, the Dealer supplies additional ESB information and documentation for Redemption in the NYSERDA Portal:
  - 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)
  - 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 (refer to 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 eighteen (18) months of the voucher approval date as shown in the award letter the Dealer receives when the School Bus Voucher Application is approved. A School Bus Voucher that is not extended or redeemed within eighteen (18) months will be deemed expired and canceled. At any point within the 18-month period, a Dealer may request a School Bus Voucher extension by sending an email to the VHC. The email must state the reason for the request and contain the expected ESB delivery date and the expected Voucher Redemption date. The Dealers should attach any supporting documents from the Manufacturer or Purchaser that demonstrate the need for an extension (e.g., a letter from the school district, school board, notification of delivery delay, or scrappage delay). Attached supporting documents should contain an estimate of when the delay will be remedied.

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-four (24) 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 NYSERDA's [EFT Bank Information and Authorization Form](#). Per NYSERDA's Prompt Payment Policy, payments to Dealers can be expected within thirty (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, NYSERDA 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 (refer to 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:
  - Signed Charging Infrastructure Purchaser Agreement: Purchasers agree to the requirements of participation in NYSBIP for a Charging Voucher.
  - Third party Operator Addendum: If you are a Third-Party Operator under contract with a School District
  - Charger Specification Sheets: One for each make/model and charger
  - Electric School Bus Purchase Order: May be provision, if you are applying for ESB purchased through another program or self-purchased
  - Award Letter: If you are applying for vehicles purchased through another program
  - Fleet Electrification Plan: If you are applying for the Fleet Electrification Plan Bonus (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 including:
  - Signed Charging Infrastructure Purchaser Participation Agreement
  - Signed Third-Party Operator Addendum – if you are a Third-Party Operator
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) and additional supporting documentation including:
  - Charger Specification Sheets: One for each make/model and charger
  - Electric School Bus Purchase Order: May be provision, if you are applying for ESB purchased through another program or self-purchased
  - Award Letter: If you are applying for vehicles purchased through another program
  - Fleet Electrification Plan: If you are applying for the Fleet Electrification Plan Bonus (refer to section 3.1.1)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.

**10.2.1 Visiting ESB Charging Voucher Procedure (for BOCES)**

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. Since the chargers are not associated with bus purchases, enter instead the number of ports you are requesting when asked how many buses you are applying for. **Be sure to check the box indicating that your charging application is not associated with a bus purchase.**
4. Mark that you are applying with a Fleet Electrification Plan – there will be a box to check for this under “Incentive Information.”
5. Enter project data.
6. Enter charger data. This includes number of chargers, manufacturer, model, number of ports, and location.
7. Upload supporting documents, including:

- Signed Charging Infrastructure Purchaser Agreement: Purchasers agree to the requirements of participation in NYSBIP for a Charging Voucher.
- Charger Specification Sheets: One for each make/model and charger
- Electric School Bus Purchase Order: The application will not allow the Purchaser to proceed without putting a document here. Because these Charger(s) are not associated with a bus purchase, please upload a dummy document.
- Fleet Electrification Plan: submit the completed Modified FEP.

8. Accept Terms and Conditions and submit Charging Voucher Application.

### 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 (refer to 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. NYSEDA and the VHC will review the submitted information for completeness and eligibility. If the Charging Voucher Redemption submission is deemed complete and valid, NYSEDA 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 NYSED, 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. NYSEDA 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 NYSEDA 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](#).



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