

## Track I - Eligible Activities

- **Eligible Activities**

- School buildings included as part of the project must be located in an under-resourced community.
- Engineering & Architecture Services
  - Energy Benchmarking
    - NYSERDA will provide cost-sharing to eligible applicants that utilize [EPA's Energy Star Portfolio Manager \(ESPM\) benchmarking platform](#). Applications that include Energy Benchmarking shall contain scopes of work with similar tasks and deliverables as outlined in the P-12 Schools Initiative Energy Benchmarking Guidelines document, available at NYSERDA's [P-12 website](#).
  - Energy Studies\*
    - Energy studies may be targeted on specific energy consuming systems or comprehensive whole building evaluations.
    - Eligible studies include, but are not limited to, evaluation of energy efficiency measures, clean energy projects, renewable generation, retro-commissioning, and strategic planning to reduce carbon footprint.
  - Clean Heating and Cooling Studies (new and existing systems)\*
    - Eligible studies include, but are not limited to, GSHP, ASHP, and VRF systems. Other projects demonstrating space and/or water heating or cooling without the use of fossil fuels may be eligible.
  - Energy Efficiency and Clean Heating and Cooling Design Services\*
    - Energy Efficiency – Eligible Energy Efficiency design costs include, but are not limited to, design of clean energy and energy efficiency improvements, energy modeling and analysis, and integrated project delivery. Provided the design scope of work includes tasks supporting major energy reduction components, on-site renewable energy (PV, wind, solar thermal) and battery storage may also be included.
    - Clean Heating and Cooling Design Services – Eligible design projects include, but are not limited to, GSHP, ASHP, and VRF system designs. Other projects demonstrating space and/or water heating or cooling without the use of fossil fuels may be eligible. Eligible project activities include, but are not limited to, the development of heating and cooling load calculations, equipment schedules, drawings, mechanical plans, and test boreholes.
  - Energy Master Planning and Decarbonization Roadmaps\*
    - Energy Master Planning - Eligible services include, but are not limited to, coordinating a comprehensive evaluation of existing energy systems, current and future energy needs, and long-term energy goals, resulting in an energy master plan. The energy master plan will serve as a roadmap, or action plan, with a minimum two-year outlook that identifies and prioritizes recommendations to improve energy efficiency and reduce greenhouse gas emissions.
    - Decarbonization Roadmaps – Eligible services include, but are not limited to, engaging stakeholders, assessing building stock, setting decarbonization goals, planning and implementing short and long-term zero energy, all-electric and renewable energy projects and identifying how the school will track and report progress. The roadmap will serve as a strategic document that identifies and prioritizes recommendations to integrate decarbonization goals into new construction, major modernization, retrofits and system replacement projects.

- Energy Performance Contracting
  - Eligible services include, but are not limited to the preparation of requests for proposals, the review of energy service company (ESCO) proposals, the review and negotiation of the scope of work for the EPC, the review the savings calculations for the EPC and providing the 3rd party review of an EPC to document that the EPC meets the New York State Education Department requirements for Energy Performance Contracting.
- Community Presentations
  - Eligible activities include presentations to the school community to promote the implementation of a clean energy project (e.g. school board meeting, parents and teachers association meeting, booth at farmers market, etc.).
- Sustainability and Resiliency Consulting
  - Eligible activities include planning for and assessing the ability of a school to be resilient when dealing with climate change, to ensure that schools will be able to adapt to climate-related risks and disruptions.
- Clean Transportation Studies
  - Eligible studies include assessing the feasibility of transitioning bus fleets to zero-emission alternatives, such as battery-electric or hydrogen fuel cell buses. Potential areas of study include, but are not limited to:
    - Assessing the electrical infrastructure upgrades and charging equipment needed to accommodate a fleet of zero-emission buses.
    - Assessing the potential cost associated with transitioning to zero-emission buses.
    - Assessing the potential scheduling or logistical challenges that may need to be resolved when transitioning to zero-emission buses.
    - Assessing the type of zero-emission buses to purchase as it relates to the need, location and size of the school district.
  - Applicants should reach out to their local utility [contact](#) associated with the EV Make-Ready Program to see if funding is available for fleet assessments before applying for funding through the Clean Green Schools Initiative.
- Community Solar and Clean Energy Purchasing
  - Eligible activities include assessing [Community Solar](#) and [Clean Energy Purchasing](#).
- Indoor Air Quality Evaluation and Management
  - Eligible activities include, but are not limited to:
    - Detailed existing system condition survey
    - Performance testing - TAB assessment of the HVAC systems, ventilation level measurement, filter pressure drop measurement, air testing
    - Evaluation of existing IAQ building systems, current and future IAQ needs, and long-term IAQ goals, resulting in an IAQ master plan.
    - Installation of permanent IAQ sensors and continuous IAQ monitoring of results
    - Participate in an IAQ building certification program such as [Fitwel](#), [Reset](#), [Well](#), etc.
    - Note - Indoor Air Quality (IAQ) analysis must predominantly focus on developing solutions that improve the performance of energy related building systems. Analysis shall ensure that there is adequate ventilation, and that ventilation is compliant with applicable code requirements and building system best practices, such as [ASHRAE Epidemic Task Force Core Guidance](#).

- \*Studies, design and planning services that include envelope and/or HVAC systems are required to evaluate the impacts on infectious disease transmission related to the envelope and/or HVAC improvements and the optimal strategies for mitigating infectious disease transmission in accordance with the current [ASHRAE Epidemic Task Force Core Guidance](#).
  - On-Site Energy Manager
    - On-Site Energy Managers are responsible for creating energy efficient processes that decrease cost and waste. Schools can lower operational costs, reduce maintenance time, and create comfortable, safe areas by hiring or assigning a dedicated On-Site Energy Manager.
    - Eligible activities include, but are not limited to:
      - Initiate and develop an energy management plan that is a living document that is updated throughout the engagement and works towards the facility provided energy goal.
      - Develop and/or maintain an energy tracking and monitoring system.
      - Develop and/or maintain a cross-functional energy team and hold monthly meetings.
      - Develop a strategy for energy savings Measurement & Verification.
      - Conduct walkthrough audits and reports that identify savings opportunities (CapEx, O&M, etc) for further investigation; provide reports to NYSERDA and the facility for review and comment.
      - Review maintenance operational schedules and procedures to identify operational savings opportunities and develop preventative (rather than reactive) maintenance plan; schedule employee training sessions to address the identified operational issues that impact energy.
      - Develop and propose energy and productivity projects; including developing the business case.
      - Reporting:
        - Quarterly savings reports that document results from both capital upgrades and operational changes.
        - Project management check-ins with NYSERDA via conference call at least once per month.
        - Final report that documents overall effort and progress against facility energy goal.
      - Development of marketing materials highlighting and promoting projects.
      - Sustainability Activities:
        - Coordinate a variety of sustainability activities and projects to help students and staff reduce waste, reduce energy use, reduce water consumption, improve air quality and increase green space.
        - Coordinate with students, staff, administration, food service and facilities/custodial staff, and parent volunteers on the implementation of in-school sustainability activities and initiatives.
        - Facilitate ongoing meetings with designated teacher teams and provide coaching and support to existing staff around new sustainability curriculum and culture change within the school.
        - Hold periodic all-staff sustainability meetings at assigned school to coordinate conservation efforts.
        - Measure, track and assess sustainability data to support reporting projects.
        - Communicate the sustainability projects and results to the school community.

- On-Site Energy Manager is preferred to be at the district level (or across districts), however NYSERDA is open to individual buildings applying to receive On-Site Energy Manager services.
  - On-Site Energy Manager services may be performed by a new permanent hire, contracted staff, or a hybrid arrangement of supplementing permanent staff with contracted staff.
  - In order to fully realize the benefit of the On-Site Energy Manager, the term of the On-Site Energy Manager engagement will be a minimum of 12 months.
  - Applicants must:
    - Not have an existing dedicated full time Energy Manager on-site.
    - Effectively demonstrate the need for an On-Site Energy Manager.
  - On-Site Energy Manager engagements must:
    - Be at least 0.5 Full Time Equivalent (20 hours per week).
    - Use funds for On-Site Energy Manager services only and not for implementation or equipment purchase.
  
- Services Associated with Clean Energy Projects
  - Grant Writing
    - Eligible activities include, but are not limited to:
      - Writing complete or partial grant proposals.
      - Editing grants written by Applicant's staff.
      - Supporting and coaching Applicant's staff members who are writing grants.
      - Providing assistance in identifying and facilitating collaborations/partnerships.
      - Following-up on proposals submitted.
      - Customizing workshops on grant-writing fundamentals for Applicant's staff.
  - Fiscal Advisors
    - Eligible activities include, but are not limited to:
      - Identifying the financing of a project.
      - Assisting with the various documents that need to be filed with the State Education Department (SED) including the SA-139s and Final Cost Reports.
      - Assisting in developing the debt payment schedules and building aid estimates.