

Track I - Scope of Work Template

Please note, while the exact format of the Scope of Work template is not required, all information requested within the Scope of Work template must be included in some form in the project Scope of Work.

Scope of Work

The Scope of Work shall include the following:

- **Project Description**
 - Intent of Project
 - Reason why the applicant is interested in project and what will it accomplish.
 - Describe which Track I services the applicant is including in the Scope of Work (e.g. energy studies, energy benchmarking, design, etc.).
 - Building Description
 - Name and location of each building included in the project, building use, square footage of building (if the facility is mixed use, enter school space independently), number of students and number of staff.
 - *For Energy Studies and Energy Efficiency and Clean Heating and Cooling Design Projects:*
 - Building(s) construction type, age, number of stories and operating hours.
 - Current configuration and condition of energy consuming systems relevant to the study.
 - *For On-Site Energy Manager:*
 - Effectively demonstrate the need for an On-Site Energy Manager.
- **Consultant or Subject-Matter Expert Information**
 - Demonstration of qualifications (*if applicable* – see Track I Consultant Requirements section of PON 4924).
 - Include the consultants name and contact information (e.g. address, phone number and e-mail address). If there are multiple consultant firms included in the Scope of Work, include the contact information for each firm and identify what tasks each consultant is responsible for.
- **Projects that anticipate applying to Track II of PON 4924 should consider adding a task to the Track I Scope of Work to engage with Environmental Justice and Disadvantaged Community stakeholders. NYSERDA is available to assist in creation of this task.**
 - An environmental justice or disadvantaged community stakeholder may include individuals or organizations representing communities with high poverty rates; high concentrations of residents that are members of minority groups or bear a disproportionate share of the negative environmental consequences (e.g., higher rates of asthma, heart disease and cancer) resulting from proximity to polluting facilities, highways, and fossil fuel energy infrastructure.
 - Project planning shall include engagement with regional/local representatives of environmental justice and/or disadvantaged communities to understand community priorities and identify how the proposed project can be beneficial to community residents.
 - Engagement shall include identification of potential impacts of the project on the community and opportunities for mitigating negative impacts and optimizing beneficial impacts.

- **Tasks and Deliverables** - Itemize project tasks and identify their corresponding deliverables. Each task requires a deliverable (e.g. interim, draft and/or final).

Tasks

- *For Energy Studies:*
 - Each potential energy efficiency measure (EEM) must be listed as a single task and indicate the following:
 - Scope of the EEM evaluation (including the subject system or operation & potential solutions)
 - Current condition of the system or operation (if not included in the previous section)
 - Data collection method (ex. data logging, BMS, nameplate, etc.)
 - Energy savings calculation method (modeling - specify software, spreadsheet, etc.)
- *For Energy Efficiency or Clean Heating and Cooling Design Projects:*
 - The tasks must include the following:
 - Building(s) included
 - Technologies to be designed
 - Method and type of data collected
 - Number and access needed for site visits
 - Method of analysis and design
- *For On-Site Energy Manager:*
 - The tasks below are examples and may be included in the SOW. Additional tasks related to energy management may be added.
 - 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 for further investigation.
 - Review maintenance operational schedules and procedures to identify operational savings opportunities and develop preventative (rather than reactive) maintenance plan.
 - Develop and propose energy and productivity projects; including developing the business case.
 - Coordinate reporting activities (e.g. documents overall effort and progress against facility energy goal).

Deliverables

The final deliverable shall include the following:

- Concise summary of project, study or design work
 - The concise summary of measures evaluated shall include recommendation status, an overview of payback, costs, and savings in dollars, MMBtus, and kWh, and kW where appropriate. An example summary has been provided for reference on the Clean Green Schools Initiative documents and resources [website](#) (see Track I - Project Summary Sheet Template).
- Brief overview of project, study or design work
 - The brief overview of the project shall include intent, findings, recommendations, and the economics of the recommendations (if applicable).
 - Final deliverables shall include analysis for projects evaluated and not recommended including quantified estimated energy savings expected for all analyzed measures. The Program supports site-specific analysis and therefore, rule of thumb assumptions and percentage savings calculations are not acceptable.

- Background of project, study or design work
- Summary of environmental justice and disadvantaged community engagement (*if applicable*)
 - List the organizations/individuals consulted, along with the date(s) of engagement.
 - Provide a summary of the community priorities identified and how the proposed project may be beneficial to the community.
 - Provide a summary of the potential impacts of the proposed project on the community and opportunities for mitigating the potential negative impacts and optimizing the potential beneficial impacts.
 - Explain how stakeholder input is incorporated into or addressed by the project, study, or design work.
- Project, study or design results and recommendations
 - Indicate reasoning for recommendations
 - Economic analysis (if applicable)
 - Additional benefits of recommendations
- Detailed schedule (if applicable)
- Layouts/drawings/plans (if applicable)
- Itemized project implementation costs (at minimum material and labor costs associated with each task/measure with sources of cost estimates and/or vendor quotes as applicable)
- For *Energy Study or Energy Efficiency/Clean Heating and Cooling Design Appendices*:
 - Historic energy usage and costs (12 months minimum)
 - Calculations for all studied measures. For software modeling, include software type, inputs, and outputs of analysis.
 - Load calculations (if applicable)
- For Ancillary Task Project Appendices (e.g. Grant Writers, Fiscal Advisors or Clean Energy Educational Projects):
 - Proof of project completion (e.g. copy of grant application, marketing material for an event, building aid package for a project, etc.)
- **Assumptions/Responsibilities of each party**
 - *Add assumptions and responsibilities that directly correlate to the completion of the project.*
- **Itemized Schedule (by task)**
 - *Add a schedule in weeks, starting from the issuance of a NYSERDA Purchase Order for the project.*
- **Itemized Budget (by task)**
 - *See budget template on the Clean Green Schools Initiative documents and resources [website](#) (see Track I – Budget Template).*