**P-12 Schools: Green and Clean Energy Solutions Scope of Work**

The following is provided as a guide for Scope of Work for P-12 Schools: Green and Clean Energy Solutions cost-sharing submissions. Please see Section IV. Cost-Sharing (pgs. 3 – 7) in PON 4157 for more information.

The Scope of Work for **energy studies** shall include the following:

* *Goal of Study*
* *Consultant Information*
* *Tasks and Deliverables*
	+ *Building(s) included*
	+ *Equipment to be reviewed*
	+ *Method and type of data collected*
		- *Number and access needed for site visits*
	+ *Method of analysis*
	+ *Interim deliverables (if applicable)*
	+ *Draft deliverables*
	+ *Final deliverables*
* *Assumptions/Responsibilities of each party*
* *Itemized Schedule (by task)*
* *Itemized Budget (by task)*

The Scope of Work for **design** shall include the following:

* *Goal of design*
	+ *For Net Zero design:*
		- *Discussion of the long-term plan to achieve Net Zero*
* *Consultant Information*
	+ *Demonstration of qualifications (see Consultant Requirements)*
* *Tasks and Deliverables*
	+ *Building(s) included*
	+ *Scope of design*
	+ *Method and type of data collected*
		- *Number and access needed for site visits*
	+ *Method of analysis to determine energy savings from EEMs or system design*
	+ *Interim deliverables (if applicable)*
	+ *Draft deliverables*
	+ *Final deliverables*
* *Assumptions/Responsibilities of each party*
* *Itemized Schedule (by task)*
* *Itemized Budget (by task)*

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| **P-12 Schools: Green and Clean Energy Solutions****Scope of Work (SOW) Template** *All information requested below must be included in the scope of work. There is no specific format required for the scope of work. A template scope of work is imbedded into this document, which can be used, if desired.* **Please do not include customer utility account numbers in the scope of work.** |
| **Project Description:** *(recommended length: 1 page)*Provide an overview of the project, including: * Goal of study or design
	+ Type of study/design (ex. targeted study, RCx study, GSHP design, etc.)
	+ Reason the customer commissioned the project/ What the project will help accomplish
	+ For Net Zero design, discussion of the plan to achieve Net Zero
* Consultant Qualifications
	+ demonstrate qualifications per Consultant Requirements in PON 4157.
* Facility description
	+ Name and/or location of building(s)
	+ Space types(s) to be included (ex. auditorium, classroom, etc.)
	+ Building(s) construction type, age, square footage, number of stories, operating hours
	+ Current configuration and condition of energy consuming systems relevant to the study/design.
 | **Project Description:**Goal of study: Consultant Qualifications:Facility description:   |
| **Tasks & Deliverables** *(recommended length: 1-3 pages)** Itemize project tasks and identify their corresponding deliverables. Each task requires a deliverable.Example project tasks include kick of meeting, documentation collection, site visits, schematic design, design development, and energy savings analysis of each design component.
* Each potential EEM (energy efficiency measure) or energy saving design component should indicate the following:
	1. Scope of the energy savings evaluation (including the subject system or operation & potential solutions)
	2. Current condition of the system or operation (if not included in the previous section)
	3. Data collection method (ex. data logging, BMS, nameplate, etc.)
	4. Energy savings calculation method (modeling (specify software), spreadsheet, etc.)
		+ *Note: NYSERDA must be able to review assumptions used in the calculation methodology. If using proprietary software or spreadsheets, please divulge and discuss with NYSERDA an appropriate solution to sharing assumptions and results.*
* Indicate if progress updates will be provided for long-term projects to ensure project direction and results are in line with NYSERDA cost- share eligibility. Examples include:
* Monthly or quarterly emails to applicant and NYSERDA for review and approval,
* Scheduled update calls with applicant and NYSERDA, and
* Interim draft reports to be reviewed, approved, and finalized with applicant and NYSERDA.
* Indicate that deliverables will be provided for review and comment to the School and NYSERDA, which will encompass the tasks as outlined in the approved scope of work. Revisions will be made to the report until deemed satisfactory by NYSERDA.

*Note: NYSERDA will provide written deliverable comments to the school and service provider. A conference call to discuss the comments may be held at the request of any party. Responses to the comments should come in the form of revised deliverables and in-line responses within the comment document. The revised deliverables must also include responses to the school’s comments. NYSERDA will issue a final deliverables approval letter and request final invoicing for the project after all comments are satisfactorily addressed.* | **Tasks & Deliverables**Task 1: *[ex. Kick off meeting]*Scope: Deliverable: Task 2: *[ex. Documentation Collection]*Scope: Deliverable: Task 3: *[ex. Utility Bill Analysis]*Scope: Deliverable: Task 4: *[ex. Site Visits]*Scope: Deliverable: Task 5: *[ex. Progress Reports to NYSERDA]*Scope: Deliverable: Task 6: EEM 1 – *[ex. AHUs 1-6]*EEM evaluation & potential solutions: Current condition: Data collection method: Calculation method: Deliverable: Task 7: EEM 2 – *[ex. Steam Boilers]*EEM evaluation & potential solutions: Current condition: Data collection method: Calculation method: Deliverable: Task 8: *[ex. Net Zero Potential]*Scope: Deliverable: Task 9: *[ex. Final Report to NYSERDA]*Scope: Deliverable:  |
| **Assumptions** *(recommended length: 1 paragraph)** Provide a list of assumptions relevant to project completion. Note any information the customer has agreed to provide the consultant for the completion of the study.
 | **List of Assumptions***Examples include:** *Access to mechanical rooms, roof, and basement will be provided*
* *Access to and accompaniment by facility staff to applicable spaces will be provided*
* *Access to building management software systems will be provided*
* *Minimum of 1 year of preceding utility bill rates and usage will be required and utilized*
* *As-builts or other design schematics, if available, will be provided*
* *Previous energy analysis performed either in-house or by 3rd party service providers will be shared with the consultant.*
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| **Schedule** *(recommended length: 1 paragraph)** Provide an anticipated schedule for completing tasks in a “weeks from Purchase Order” format. Each SOW task item must be listed as a separate schedule line item. Deliverables to NYSERDA must be listed as separate schedule line items.

 *Note: NYSERDA must be notified as soon as possible if the deliverable dates in the schedule change.* | *Example:*

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| ***Task #*** | ***Task*** | ***Schedule****(in weeks from Purchase Order)* |
| *1* | *Kick off Meeting* | *1* |
| *2* | *Documentation Collection* | *3* |
| *3* | *Utility Bill Analysis* | *5* |
| *4* | *Site Visits* | *6* |
| *5* | *Progress Report to NYSERDA* | *12* |
| *6* | *EEM #1 Evaluation* | *16* |
| *7* | *EEM #2 Evaluation* | *16* |
| *8* | *Net Zero Potential* | *18* |
| *9* | *Study Report to NYSERDA* | *20* |

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| **Budget** * Provide a detailed budget breakdown using the Budget Template (separate spreadsheet found on the Program [webpage](https://www.nyserda.ny.gov/All-Programs/Programs/P-12-Green-and-Clean-Energy-Solutions)), or equivalent that includes all the information identified in the Budget Template. Each SOW task item must be listed as a separate budget line item.

Include the total study cost and list the school and NYSERDA cost share within the scope of work. | *[Delete the following text that is not applicable.]**[For schools utilizing a FlexTech Consultant:]*The total cost to complete the tasks associated with this scope of work is $\_\_\_\_\_ . The School will contribute $\_\_\_\_\_ and NYSERDA will contribute $\_\_\_\_\_, as specified in the NYSERDA Purchase Order.*[For schools utilizing an independent service provider:]*The total cost to complete the tasks associated with this scope of work is $\_\_\_\_\_ . The School will contribute $\_\_\_\_\_ and request $\_\_\_\_\_ reimbursement from NYSERDA, as specified in the NYSERDA Purchase Order.*[Insert detailed budget breakdown, or submit a standalone budget spreadsheet]* |