**NYSERDA Clean Energy Communities Program**:   
County-Hosted Trainings High-Impact Action (HIA)

Guidance Document

**Table of Contents**

[I. County-Hosted Trainings Overview 2](#_Toc149905884)

[Training Course Details & Descriptions 3](#_Toc149905885)

[Logistics: Planning & Administration 5](#_Toc149905886)

[Roles & Responsibilities 5](#_Toc149905887)

[Planning & Executing Trainings 6](#_Toc149905888)

[CEC Program – Documentation & Approvals 7](#_Toc149905889)

[Wrap-up Activities 7](#_Toc149905890)

[Additional Q&A 8](#_Toc149905891)

# County-Hosted Trainings Overview

The Clean Energy Communities (CEC) Program’s County-Hosted Trainings HIA is designed to convene municipalities and provide trainings and resources for managing responsible clean energy development in their communities. This Action leverages the unique positioning of counties across New York State to utilize established relationships and communication channels to reach local officials, understand and address local priorities, and organize and host trainings. County-Hosted Trainings acts as an extension of NYSERDA’s existing efforts to provide educational trainings, tools, and resources to New York communities and local governments.

Below is an overview of the remaining sections of this guidance document:

* **Section II** provides supplemental training details including in-depth course descriptions, intended audiences, course lengths, and information about continuing education credit availability. *Please note*: course offerings and content will not be substantively altered or customized on a county-by-county basis; additionally, courses will not be shortened beyond the minimum timeframes noted in Section II.
* **Section III** provides information and instructions to clarify roles, responsibilities, and expectations pertaining to the completion of this Action. This Section attempts to cover all phases of this Action, including planning, execution, documentation, approval, and wrap up.
* **Section IV** provides answers to nuanced questions not covered elsewhere.

Please reach out to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) with any follow-up questions or items not addressed within this Guidance Document.

# Training Course Details & Descriptions

***Course*: *Clean Energy and Your Comprehensive Plan***

***Length***: 1.5 – 2 hours

***Intended Audience(s):*** Planning & Zoning Board Members, Committee Members (Comprehensive Plan, Sustainability, etc.), Code Enforcement and Building Officials, Municipal Staff

***Credit Eligibility:*** 1.5 – 2 hours Annual Training Credit for Planning & Zoning Board Members (subject to approval by the municipality)

***Course Description:***

The Clean Energy and Your Comprehensive Plan course provides an introduction to best practices and strategies for incorporating clean energy goals and objectives into a new or updated municipal comprehensive plan. The course is primarily intended for municipal staff including local board members (such as Planning, Zoning, and local legislative boards), committee members (such as Comprehensive Plan or Sustainability committees), and planning and building staff. Information presented in the course ranges from introductory planning and clean energy basics to detailed comprehensive planning strategies.

This course begins with an introduction to New York’s clean energy landscape, including policies, programs, and technologies shaping the development of renewables throughout the State. It then introduces the role of comprehensive planning and its relationship to local zoning and land use regulations. The remainder of the course focuses on processes and strategies for incorporating clean energy goals and objectives into a balanced, customized comprehensive plan, which is intended to be forward-looking and reflective of the priorities of the local community.

***Course*: *Overview of the Model Solar Law***

***Length***: 1.5 – 2 hours

***Intended Audience(s):*** Planning & Zoning Board Members, Code Enforcement and Building Officials, Municipal Staff

***Credit Eligibility:*** 1.5 – 2 hours Annual Training Credit for Planning & Zoning Board Members (subject to approval by the municipality)

***Course Description:***

The Overview of the Model Solar Law course provides an introduction to land use and zoning considerations for solar as included in the Model Solar Law, a resource contained in NYSERDA’s Solar Guidebook for Local Governments. The course is primarily intended for municipal officials including local board members (such as Planning, Zoning, and local legislative boards), planning and building department staff, and other municipal staff.

The course begins by introducing solar energy system basics, as well as covering policies and programs shaping solar development in New York. The course then provides an overview of resources contained in the Solar Guidebook for Local Governments, before spending the bulk of the time on the Model Solar Law. The Model Solar Law is a template zoning law intended to be comprehensive and highly customizable; this course provides municipalities with the information required to adopt a well-considered, balanced solar law.

***Course*: *Overview of the Model Battery Energy Storage System Law***

***Length***: 1.5 – 2 hours

***Intended Audience(s):*** Planning & Zoning Board Members, Code Enforcement and Building Officials, Municipal Staff

***Credit Eligibility:*** 1.5 – 2 hours Annual Training Credit for Planning & Zoning Board Members (subject to approval by the municipality)

***Course Description:***

The Overview of the Battery Energy Storage System (BESS) Law course provides an introduction to land use and zoning considerations for BESS as included in the Model BESS Law, a resource contained in NYSERDA’s BESS Guidebook for Local Governments. The course is primarily intended for municipal officials including local board members (such as Planning, Zoning, and local legislative boards), planning and building department staff, and other municipal staff.

The course begins by introducing BESS basics, as well as covering policies and programs shaping clean energy development in New York. The course then provides an overview of resources contained in the BESS Guidebook for Local Governments, before spending the bulk of the time on the Model BESS Law. The Model BESS Law is a template zoning law intended to be comprehensive and highly customizable; this course provides municipalities with the information required to adopt a well-considered, balanced law to regulate energy storage system deployment.

***Course*: *Understanding Solar PV Permitting and Inspecting in New York State***

***Length***: 2 hours

***Intended Audience(s):*** Code Enforcement Officials, Building Safety Inspectors, Fire Safety Inspectors

***Credit Eligibility:*** 2-hours in-service training credit through NYS Dept. of State, Division of Building Standards & Codes (NYSDOS BSC). 1 hour Topic 1: Enforcement & Administration, 1 hour Topic 2 – Uniform Code.

***Course Description:***

The Understanding Solar PV Permitting and Inspecting in New York State course provides a substantive overview of several topics relevant to solar photovoltaics (PV) permitting. The course contains information primarily aimed at municipal administrative staff including Code Enforcement Officials, Building and/or Fire Safety Inspectors, and related positions. This content may also be relevant to local policy makers, planning and zoning board members, and other staff. Information presented in the course ranges from rudimentary solar basics to advanced technical and code compliance material.

The course begins with an introduction to the basics of solar PV permitting applications, highlighting the New York Unified Solar Permit and a list of construction documents required for a complete PV project application. After the initial section, the course provides in-depth information about components of a PV array, applicable codes like the Uniform Code and the National Electric Code, and resources available for PV permitting and inspection as contained in NYSERDA’s Solar Guidebook for Local Governments. The course concludes with a review of common installation errors and their corresponding code violations. Upon completion of the course, attendees should have a strong foundation of knowledge about the requirements, documents, and processes involved in permitting and inspecting PV systems.

# Logistics: Planning & Administration

## Roles & Responsibilities

Successful planning and execution of the County-Hosted Trainings HIA requires communication and coordination between three primary parties: representative(s) of the County hosting the training, the CEC Coordinator, and a representative of NYSERDA’s Clean Energy Siting Team (Siting Team).

**Host County Representative(s):**   
The County shall identify a staff member or representative to act on behalf of the County as lead for the completion of this Action and associated responsibilities. The County Lead may delegate tasks to supporting staff, colleagues, and other partners as needed. The roles and responsibilities of the County Lead are primarily administrative, including:

* Promoting the event(s): creating marketing materials, publishing and distributing materials to municipalities and local audiences
* Participating in the event(s): the County Lead – or alternate representative – shall provide introductions at each training course and participate in Q&A as needed.
* Tracking registration & attendance: ensuring that at least 35% of the municipalities in the county are represented for each training, documenting attendance, and verifying that attendees were present for the full session (as needed).
* Event logistics:Whether trainings are offered virtually or in-person, the County representative will be responsible for event logistics.
* Providing required documentation: In coordination with the CEC Coordinator and NYSERDA representative, the County Lead will complete the registration materials required to earn points for each training hosted by the County. The County is also responsible for collecting names and NYS Training ID numbers for any attendees wishing to receive NYSDOS BSC in-service credit, where applicable.

**CEC Coordinators:** Coordinators play a critical role in working with the County to ensure all requirements are met to achieve completion of this HIA. The level of coordinator engagement may vary county-to-county based on the administrative capacity and subject matter familiarity of the host county. Roles and responsibilities may include:

* Marketing the event(s): working with the county to market and publicize future training(s).
* Introducing the CEC Program: as needed, Coordinators may be available to provide a brief introduction to the CEC Program in conjunction with training courses offered through this HIA.
* Submitting required documentation: Coordinators will work with the County Lead to ensure the successful submission of all documentation required to earn points for each training hosted by the County.

**NYSERDA Siting Team:** The Siting Team’s role in this HIA is primarily of a substantive nature (presenting training courses), but in some cases will include administrative tasks to support the County and CEC Coordinator. Primary responsibilities include:

* Present course(s) and/or provide presenters: the Siting Team, whether through internal staff or contracted third-party instructors, will procure instructors for these free training courses.
* Coordinate training credits: where in-service training credits are requested through NYSDOS BSC, the Siting Team representative will be responsible for coordinating with NYSDOS, including submitting registration and attendance information in conjunction with the County Lead. For non-DOS-accredited courses, the Siting Team will provide counties with template attendance certificates for the County Lead to distribute to attendees.

**Other:** There may be other local groups or organizations with which a host County may collaborate in planning and executing a training for this HIA (e.g. local or regional planning agencies, agricultural or environmental protection groups). Counties are encouraged to be creative and utilize local partnerships where available to contribute to the success and increase the reach of these trainings.

## Planning & Executing Trainings

When planning for and administering trainings for the County-Hosted Trainings HIA, there are numerous considerations which should be discussed by the County Lead, CEC Coordinator, Siting Team, and any other involved partners:

* Course offerings: Consider which courses are of interest and/or relevant to municipal officials and communities throughout the county. Given the attendance requirements included for completion of this HIA, it is imperative that selected courses are reflective of meaningful interest from potential attendees. [*Guiding Question: what training(s) would most benefit municipalities across the county based on current/future development needs?]*
* Course sequencing: Due to the varying subject matter and intended audiences throughout the course offerings, counties should consider the order in which to offer courses. It may be preferential to group or sequence course offerings by technology focus, anticipated audience, or different criteria. [*Guiding Questions: In what order do we want to offer these courses? Who is our anticipated audience?]*
* Scheduling: Consider your options for scheduling a course(s) based on anticipated audience and previous experience hosting events. Scheduling decisions should reflect the availability and time commitments of the anticipated audience. [*Guiding Question: What dates and times would work best for these trainings based on availability and needs of our anticipated audience?]*
* Format: Consider whether an in-person or virtual training(s) will be more successful in the county. If a virtual offering is preferred, ensure that the County Lead or administrative staff have familiarity and capability with webinar administration. [*Guiding Question: In this county, which event format would be most conducive to meeting attendance requirements for this HIA?]*
* Marketing: Consider how best to successfully promote and market training(s) to local governments and municipal staff across the county to ensure you reach the attendance requirements for this HIA. Approaches may include email distribution lists, flyers, local advertisements, collaboration with local/regional partners, follow-up phone calls, etc. [*Guiding Question: how can we be successful in marketing the event to our anticipated audience(s)?]*
* Day-of Logistics: Consider who will be tasked with ensuring a smooth run of show for the training(s). For in-person course offerings, responsibilities may include ensuring adherence to health and safety guidelines, providing refreshments, ensuring that technology needs are met and that all equipment is operational, etc. For virtual course offerings, responsibilities may include administering the virtual meeting platform, assisting attendees with technical difficulties, scheduling practice webinars with presenters, etc. *[Guiding Question: Based on the selected format, what does a successful event look like/require from staff?]*
* Course Credits: Consider the steps and attendee information required to ensure that training credits can be successfully offered for the course(s). *[Guiding Question: What type of credits can attendees receive through this training course? What is required to ensure they receive credit?]* 
  + *For courses accredited through the NYSDOS* (audience: code enforcement officials, building inspectors, etc.): the Siting Team will work with the County Lead to ensure submittal requirements are met; specific sign-in sheets and/or registration information will be required based on the course format. For virtual trainings, Counties should capture NYS Training ID numbers as part of the registration process to aid in filling out these forms. Training credits will be issued directly by NYSDOS.
  + *For courses which do not require NYSDOS-approval* (audience: planning and zoning board members, etc.): the Siting Team will provide the County Lead with a template to generate and provide training certificates for attendees. Certificates are to be shared with attendees by the County and are subject to approval by the attendee’s municipality.

## CEC Program – Documentation & Approvals

To earn credit for this action, for each course presented, a completed County-Hosted Trainings Certification Form (available online at [www.nyserda.ny.gov/cec](http://www.nyserda.ny.gov/cec)) must be submitted, documenting the following information:

|  |  |
| --- | --- |
| **Training Information:**   * Host-County * County contact information * Course offered (‘Training Type’) * Date of training | **Attendee Information:**   * First Name * Last Name * Affiliated municipality * Title * Date of training * Email (and/or) phone number * NYS Training ID (for DOS courses) |

To receive approval, the County-Hosted Trainings Certification Form must document that the training was attended by individuals representing **at least 35 percent (%) of municipalities** (villages, towns, and cities) within the County.

## Wrap-up Activities

There may be some remaining tasks or activities to be completed following a training offered through the County-Hosted Trainings HIA, including:

* Sharing presentation materials with attendees (slides, resources, and/or program materials referenced in the course): The Siting Team will share a PDF-version of the presentation with the County Lead following the training; additional resources are available online at [www.nyserda.ny.gov/Siting](http://www.nyserda.ny.gov/Siting) or [www.nyserda.ny.gov/cec](http://www.nyserda.ny.gov/cec).
* Ensuring credits for attendees: The Siting Team (in coordination with NYSDOS, as required) will work with the County Lead to provide and submit any documentation required for attendees to receive training credits.

# Additional Q&A

* May counties schedule multiple instances of the same course in advance?
  + NYSERDA will only schedule one session for each course. Each county will have the opportunity to host each course once. If the attendance threshold is not met, the county may document their municipalities’ attendance at a course hosted by another entity, including other counties. However, the county seeking credit for their municipalities’ attendance is responsible for seeking out those alternate training opportunities, gathering documentation demonstrating attendance, compiling documentation, and submitting to NYSERDA. NYSERDA will not schedule a second session of the same course for the same county. Counties may choose to reschedule sessions with notice to NYSERDA of at least three business days. If there are extenuating circumstances that prevent a scheduled course from occurring with fewer than three days’ notice, NYSERDA may allow the county to schedule a make-up session.
* May counties work together to host joint training sessions for their municipalities?
  + Yes. NYSERDA encourages collaboration among counties, especially those with fewer municipalities, to make the best use of limited NYSERDA and county staff resources. However, all involved counties must actively participate in planning and executing the training as outlined in the requirements for this action (publicizing, tracking, providing an introduction during the session, etc).
* Who is responsible for tracking attendance and submitting documentation for continuing education credits?
  + At their discretion, host counties are responsible for providing documentation/certificates to attendees seeking Annual Training Credit for Planning & Zoning Board Members. NYSERDA will not provide certificates to attendees.
  + For courses that include NYSDOS BSC in-service credit, host counties are responsible for gathering and documenting NYS Training ID Numbers, names, jurisdictional affiliations, emails addresses, and phone numbers for attendees wishing to receive credit. NYSERDA will submit final documentation to NYSDOS BSC based on documentation received from the host county.
* How can counties verify attendance for virtual trainings?
  + NYSERDA recommends using online meeting software that is capable of registering and identifying unique individuals in the meeting to make it easy to confirm attendees. The software should also be able to track when attendees signed in and when they left the meeting, to verify attendance throughout the duration of the presentation. For courses that are eligible for NYSDOS BSC in-service credit, the virtual meeting software should also include a polling or chat function so that attendees are able to actively participate in required quizzes throughout the presentation. If the host county is unable to procure software with this functionality, they may reach out to their CEC Coordinator for assistance.