

**Attachment A**  
**SCOPE OF WORK (Example)**

Company Name  
Project Director Name  
Street Address  
City, State Zip code  
Email/Phone/Fax

**TRAINING OBJECTIVES**

The objectives to be accomplished under this Agreement with x, hereafter known as the Contractor, are the following: *Briefly discuss (in approximately two paragraphs) the identified talent needs or skills gaps, how your project will address them, and how many total individuals will participate.*

**TASK 1 – PARTNERSHIPS/SUBCONTRACTS - If Applicable to Your Project**

The Contractor shall enter into Subcontracts with the following organizations to achieve the objectives of this project. *If subcontractors or partners will participate, please list them, and briefly describe each organization's role and responsibilities.*

Regardless of subcontracting or other partnering arrangements, the Contractor shall be solely responsible for the timely completion of all the tasks in the Statement of Work. The Contractor shall complete all project management activities necessary for the performance of this Statement of Work, as per attached schedule and budget, which shall include the following activities:

- Coordinate the work of the Contractor's employees and those of Subcontractors and equipment vendors that are undertaking tasks described in this Statement of Work;
- Ensure control over the project budget and adherence to the project schedule; and
- Provide all project reporting to NYSERDA as specified in this Statement of Work.

Task 1 Deliverables: Copies of all Subcontracts and/or partnership agreements

***The Contractor shall not progress to Task 2 without first receiving written approval from the NYSERDA Project Manager. Such approval shall be based upon the acceptability to NYSERDA of any Subcontracts described in Task 1 and shall be granted or withheld at NYSERDA's sole discretion.***

**TASK 2: CURRICULUM DEVELOPMENT**

The Contractor shall develop, or direct (*name Subcontractor*) to develop, and submit to NYSERDA training curriculum that reflects current standards and best practices, as identified by independent and nationally-recognized subject matter experts, for each of the following classes: *List classes here.*

The Contractor shall develop a set of training materials to accompany each curriculum. These materials shall include, but not be limited to, a syllabus, presentation materials, worksheets, and field

training requirements and shall be provided for review and approval by the NYSERDA Project Manager in advance of any training.

Task 2 Deliverables:

- Training curriculum that reflects current standards and best practices
- Training materials for review/approval by the NYSERDA Project Manager in advance of any training

**TASK 3: CONDUCT TRAINING**

The Contractor shall implement screening procedures to ensure those seeking training meet the minimum requirements or possess the necessary prerequisites for the course(s) they wish to attend. *Briefly describe prerequisites or screening procedures, if applicable.*

The Contractor shall ensure all courses to be delivered meet the following criteria:

- Focus on the expectations, needs, and job requirements of the audience.
- Provide timely and high-quality content to address the objectives as described.
- Incorporate the use of hands-on exhibits and demonstrations, as applicable to the subject.
- Advance students' skills, prepare them for nationally-recognized certification programs, and/or lead to continuing education units (CEUs).
- Provide consistent messaging and delivery for the same materials in different training sessions.

The Contractor shall deliver the following courses: *List all courses and location where the courses will be delivered.*

The Contractor shall provide a course outline for each course to be delivered for review/approval by the NYSERDA Project Manager in advance of any training. Further, the Contractor shall provide the necessary staff capable of teaching the appropriate curricula for each course to be delivered.

The Contractor shall provide each attendee pre- and post-training surveys, which will be furnished by NYSERDA, and shall submit completed surveys, class rosters, and monthly metrics reports to the NYSERDA Project Manager, as described in Task 7.

Task 3 Deliverables:

- Resumes of instructors
- Course outlines for review by the NYSERDA Project Manager in advance of any training
- Completed pre- and post-training surveys for each training session
- Class roster for each training session and monthly cumulative training metrics

**TASK 4: INTERNSHIPS**

The Contractor shall ensure that a minimum of x training participants are placed in experiential, energy-related learning opportunities focusing on building and operations skills and occupations. The Contractor shall provide to the NYSERDA Project Manager a list of all internships with a description of each internship, location of the internships and the salary for each intern for approval prior to internship placement.

The Contractor shall screen intern candidates, administer payroll, mentor the interns during their internships, and assess progress. The Contractor shall monitor interns after placements and will report to NYSERDA the number obtaining long term, permanent employment with the Contractor.

**Task 4 Deliverables:**

- Internship report to be submitted to the NYSERDA Project Manager showing the number of participants placed in internships and the number of interns obtaining long term employment.

**TASK 5: ON-THE-JOB TRAINING**

The Contractor shall screen employees and identify candidates to participate in an on-the-job training program. An on-the-job training program is a formal period for **new** employees, directed by a training plan that is developed by an employer to teach the skills necessary for employment in that position. The training plan can be developed in partnership with a training provider and may be a combination of training on the job-site, supplemented by classroom training.

Once candidates have been identified, the Contractor shall provide to the NYSERDA Project Manager a detailed Training Plan for review/approval before training begins. Required information will include, but not be limited to, the following:

- Name of the employee(s) and current position(s)
- Identified training needs and goals
- Description of occupational skills to be learned on the job
- Wage/payroll information

The Contractor shall submit necessary data to NYSERDA for the reimbursement of wages for new employees participating in the on-the-job training program and the demonstrated cost-share by the business at a rate of 50%. The incentive for wage subsidy for new employees participating in on-the-job training is for a maximum period of six-months under this contract. NYSERDA will not reimburse employment beyond six months.

Additional incentives may be paid for reimbursement of outside training and related expenses, when applied for and reviewed/approved in advance by the NYSERDA Project Manager. The Contractor shall provide invoices and other required documentation as evidence that costs have been incurred and are consistent with program goals and requirements.

**Task 5 Deliverables:**

- Final training plans
- Salary statements, payroll data, and invoices for review by the NYSERDA Project Manager

**TASK 6: PLAN TO SUSTAIN TRAINING AFTER THE CONTRACT IS COMPLETE**

The Contractor shall develop a corporate strategy and Sustainability Plan to integrate new training initiatives within standard business procedures and merge training into the corporate culture to ensure continuation of training to address specific skills gaps and changing market needs. The Sustainability Plan should demonstrate how a project can be replicated throughout an organization, either as part of

the scope or work or through future efforts to sustain training activities beyond the project scope proposed. Include any future funding sources or partnerships to be leveraged as part of the Sustainability Plan.

Task 6 Deliverables:

- Sustainability Plan

**TASK 7 – PLAN TO MONITOR AND VERIFY ENERGY AND NON-ENERGY BENEFITS**

The Contractor shall develop a Project Benefits Plan to measure and verify energy and non-energy benefits associated with the workforce training initiatives. The Project Benefits Plan shall include energy savings targets and tasks to measure and verify savings. The Plan must identify energy savings goals (kWh and MWh) and outline plans to monitor and verify energy savings over a reasonable time (such as over 6-12 months or a time period that addresses seasonal energy consideration, i.e., through two heating or cooling cycles). The Projects Benefit Plan shall include details on how energy savings will be verified, such as through bill analyses or data monitoring equipment.

Further, the Plan shall identify non-energy goals and benefits and provide details on how non-energy benefits shall be measured or monitored. The Plan should address non-energy benefits such as, but not limited to reduced staff turnover, increased occupant satisfaction, reduced tenant turnover, reduced equipment downtime, and increased number of worker certifications as appropriate.

Task 7 Deliverables:

- Project Benefit Plan to measure and verify energy and non-energy benefits associated with workforce training initiatives implemented during the project.

**TASK 8 – EVALUATION**

The Contractor shall develop and administer evaluation instruments to gauge the success of the program and gather suggestions for improvement. Advance copies of all evaluation instruments shall be provided to the NYSERDA Project Manager before they are administered. Furthermore, the Contractor shall provide attendees with pre- and post-training surveys, using templates which will be furnished by NYSERDA, and shall also provide necessary metrics and data required by NYSERDA and described below.

Upon completion of all contracted training sessions the Contractor or its partners shall submit to the NYSERDA Project Manager the completed pre- and post-training surveys within two (2) weeks after each training and a summary of student performance within 30 days. This report shall include gathered project intelligence on number of students enrolled, number of students completing, student pass rate, and certifications achieved (if applicable).

Task 8 Deliverables:

- Evaluation instruments for review by the NYSERDA Project Manager
- Completed pre- and post-training surveys

## **TASK 9 – REPORTING**

Reporting is basic to communication between the Contractor and NYSERDA's Project Manager. Reporting is necessary to measure progress and as a basis upon which the Project Manager assesses whether or not to approve the Contractor's invoices. **The NYSERDA Project Manager will not approve invoices during the course of this contract if all reporting is not current and provided in a satisfactory manner with appropriate detail as set forth below.**

The Contractor shall provide quarterly reports, within two (2) weeks of the end of each quarter, to NYSERDA's Project Manager electronically and shall deliver a Final Report, within 30 days after contract end date that summarizes the entire project. The Contractor shall report in detail on the progress for each task listed in this Statement of Work.

Reports shall include the following information:

- Title of project and contract number
- Reporting period
- Project progress, including tasks completed in quarter, tasks left to complete, etc.
- Information shall be provided in sections labeled as Task 1 (a, b, c), Task 2 (a, b, c), etc.
- Feedback from instructors delivering training
  - Identification of issues or concerns
  - Planned solutions
  - Areas where NYSERDA assistance is needed
- Status of curriculum updates, including submission of revised syllabus (if applicable)
- Metrics:
  - Summary of recruitment and training efforts
  - Complete list of courses conducted during the reporting period, including course titles, dates, instructor name and contact information, and locations where the training sessions were held
  - Completed pre- and post-training surveys
- All costs incurred to conduct student courses during the contract period
- List of materials purchased, if applicable

### Task 9 Deliverables:

- Quarterly reports (electronic); Final Report; other reports as requested by the NYSERDA Project Manager