Renew America's Schools: Affordability + Strategic Energy Pathways for Schools (A+STEPS)

Regional Hub Responsibilities

Each Regional Hub will provide *management, administration, strategic program development and planning* as follows:

- **Consortium Management and Reporting**
  - Develop consortium approach, manage subcontractors.
  - Conduct program administration.
  - Provide reporting to Department of Energy (DOE) on program metrics.
  - Collaborate with National Coordinator and participate in cross-Hub coordination activities.
- **Development of Local Education Agency (LEA) Support Strategy**
  - Building upon the proposed workplan, develop program models, approaches, resources, and training materials to support the LEA energy assessments, technical assistance and workforce development.
  - Develop regional funding and financing model to support LEA retrofits and establish a long-term model for the region.
- **Workforce Development Planning**
  - Identify regional workforce training needs to support energy saving retrofit planning and implementation, and engage workforce development boards, apprenticeship programs, community colleges, and other training resources to address identified needs.
  - Support the regional and local delivery of trainings developed by DOE and National Coordinator/National Labs.
- **Long-Term Program Continuation Planning**
  - Identify program elements needed to support ongoing LEA support beyond the award period.
  - Develop a roadmap toward convening the relationships and mechanisms to support sustained ongoing program operations, including pathways for school retrofit funding or financing mechanisms, technical assistance and workforce development needs.
- **LEA Outreach**
  - Assist in the publicizing of funding and technical assistance support for LEAs.
  - Conduct outreach activities to raise awareness of A+STEPS opportunity for LEAs.
  - Conduct targeted outreach to reach rural and low-capacity LEAs.
  - Provide metrics on LEA engagements and outreach strategies.

- **Ramp-Up and Wind-Down Planning**
    - Produce a detailed ramp-up plan within the first 60 days.
    - Produce a sustainability or wind-down plan in Year 3. Preference will be given to entities who demonstrate an ability to continue to support schools post-DOE funding.
- **Financial Management & Internal Controls**
    - Maintain financial systems capable of tracking costs at the project level.
    - Implement internal controls, segregation of duties, and audit ready documentation.
    - Monitor and manage any sub awardees or subcontractors.
    - Provide regular financial reporting.
- **Risk Management**
    - Submit a Risk Management Plan including:
        - A risk register
        - Mitigation strategies
        - Escalation pathways
        - Business continuity planning
    - Update risk assessments quarterly.

Each hub will deliver the following *LEA support activities*:

- **Strategic Energy Plan Development**
    - Collect and review existing data from LEAs, including energy audits, facility condition assessments, commissioning or retro-commissioning studies, capital plans, energy master plans, and/or other strategic plans.
    - Collect energy and building data necessary to support audits. Coordinate with National Coordinator, develop or receive audit report, review and assess.
    - Conduct additional energy assessments of the LEA facilities as necessary, targeting assessment activities necessary to deliver on requirements for follow-on funding or financing, e.g. investment-grade audits where Energy Services Performance Contracts (ESPCs) will be used. Energy assessment activities may include:
        - Baselines, benchmarking, load profiles
        - Facility audits of sufficient rigor and accuracy for planned implementation model
        - Ventilation/Indoor Air Quality (IAQ) assessment
    - Identify Energy Conservation Measures (ECM) and sequencing, through suitable approaches, such as:
        - Audit data and ECM report review
        - Energy modeling
        - Portfolio level analysis
        - Prioritization of projects (facilities) and ECMs

        - Use relevant modeling tools or equivalents. Hubs are encouraged to utilize tools that streamline applications and efforts.
    - Develop and deliver Strategic Energy Plans to each participating LEA, including:
        - Consolidation of technical findings
        - Prioritized ECMs with descriptions
        - A strategic implementation plan, including phasing
        - Funding or financing roadmap (e.g. ESPC, bonds, utility incentives, revolving internal loan funds, levies, public/private partnerships, low-interest loans, stacked funding models, etc.)
        - Proposed catalytic implementation scope
        - Capacity building and hand-off documentation
        - Required standardized program data
        - Risk and feasibility analysis
        - Stakeholder engagement plan
    - Coordinate QA/QC of Strategic Energy Plans through the National Coordinator.
    - Plans must be actionable and aligned with LEA budgets.

- **ECM Implementation Support**
    - Support implementation of DOE-funded enabling measures (up to $250K per LEA).
    - Support commissioning and functional testing for installed measures. Support may include providing resources or training, scope of work development or procurement guidance.

- **Monitoring and Verification (M&V) Support**
    - Support LEAs in monitoring and verification of catalytic ECMs. Support may include review of M&V plans, or support with M&V methodologies, such as use of EnergyStar Portfolio Manager for whole building approaches.
    - Track performance vs. projections (energy, IAQ, comfort, reliability).
    - Document cost savings, lessons learned and implementation barriers.

- **Regional Technical Assistance (TA)**
    - Provide planning support, procurement assistance, and project development TA.
    - Coordinate with regional workforce and contractor networks.
    - Maintain a helpdesk or LEA support function with defined response times.
    - Conduct workshops, training, and peer learning activities.

- **Regional Workforce Development**
    - Support and deliver training for facility staff and local contractors and incorporate existing materials from prior DOE investments including Energy CLASS Prize.

    - Provide community engagement notifications and materials.
- **Data Collection & Reporting**
    - Populate DOE's national dataset with standardized information:
        - Baselines, IAQ measurements, load profiles
        - ECM packages and costs
        - Commissioned performance and verified outcomes
        - Energy costs, pre- and post-retrofit