

Preparing an On-the-Job Training Plan

Training plans are a key element of a successful OJT engagement. The training plan maps out the steps your business will take to help the new hire achieve proficiency in their new role. The PON 3982 OJT Program requires well developed training plans to approve new hire applications and award funding. Your New York State Department of Labor (NYSDOL) Business Service Representative can assist in the development of this training plan and must sign off on it before submission to NYSERDA.

The Training Plan form can be found on the [PON 3982: On-the-Job Training Program](#) solicitation page under Associated Documents.

Example Training Plan

 Click on an image below to focus on it. Once in focus, you can zoom in or out as needed.

PAGE 1

TRAINING PLAN - PON 3982

On-the-Job Training (C Efficiency and Clean T

INSTRUCTIONS

Submitting a New Hire Application

Applications to reserve funding for a New Hire
via the NYSERDA Portal at [https://portal.nyse](https://portal.nyserda.ny.gov/)

To complete an application, you will need to

1. Job Description for the New Hire
2. Training Plan (pages 2-3 of this form)

Developing a Training Plan

Training plans are a key element of a successful
will take to help the new hire achieve proficiency
developed training plan for each new hire for

developed training plan for each new hire to New York State Department of Labor (NYSDOL) training plan and must approve it before submission.

Training Plans must include:

1. **Job Duties** – The primary activities and
2. **Frequency** – How often the employee
3. **Training Method** – Describe how your specific trainings that will be provided.
4. **OJT Hours** – List the number of hours task. Provide a comprehensive breakdown for the program: 960 hours for member [Workforce Development and Training](#) populations or disadvantaged commu

For detailed instructions on how to complete here: <https://knowledge.nyserda.ny.gov/page>

Your new hire **and** a representative from the New Hire Application.

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TRAINING PLAN - PON 3982

On-the-Job Training (C Efficiency and Clean T

NEW HIRE AND BUSINESS INFORMATION

FirstName LastName

Name of New Hire

Example HVAC, Inc.

Business Name

**Enter the number of employees of the business who re*

#	Job Duties	Frequ
1	Apply basic principles of heat pump operation	Daily
2	Install multiple types of air source heat pump systems	Daily

3	Install multiple types of air source heat pump systems	Daily
4	Install multiple types of air source heat pump systems	Daily
5	Install refrigerant piping	Weekly
6	Install supply and return register components	Weekly
7	Installation of electrical control wiring	Weekly
8	Practice safe worksite procedures	Daily
9	Support NYS Clean Heat Program incentive applications	Monthly

9		
10	Commissioning of systems	Monthl

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#	Job Duties	Frequ
11		
12		
13		
14		

NEW HIRE ACKNOWLEDGMENT

I, the undersigned New Hire, acknowledge th
the business owners, principals, or hiring man

.....
in the PON.

New Hire Signature

FirstName LastName

Print New Hire Name

NEW YORK STATE DEPARTMENT OF LABOR

OSOS ID

Priority Population / Disadvantaged Community C

Verification Documentation Type (if applicable)

NYSDOL Representative Signature

Print NYSDOL Representative Name

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Section 1

Section 1: New Hire and Business Information

 In the first section of the Training Plan, the business documents basic demographic information of the New Hire and the Business.

1

Enter both the name of the New Hire and their respective Job Title.

2

Then, enter the Business name and the current number of employees the business employs. The number of employees impacts program eligibility and the reimbursement rate for individual New Hires.

NYSERDA On-the-Job Training Program (PON 3982) Training Plan

New Hire and Business Information

Name of New Hire:	
Job Title:	
Business Name:	
Current number of employees:	

Section 2: Training Plan Details

i The Training Plan Details section of the Training Plan is intended to document the physical training activities and resources that will be provided to the New Hire as part of their employment with the business.

1

To complete the Training Plan Details, begin by determine the **Job Duties** associated with the New Hire's role. **Job Duties** represent primary activities and /or tasks the New Hire will perform in their position during the On-the-Job Training period. These duties and /or tasks can include items such as: **System Installation**, **Direct Customer Outreach and Sales**, **Data Entry**, etc. It may be helpful to leverage the **Job Description** for the role as they typically indicate specific duties the employee will be performing.

2

Then, enter these job duties and/or tasks into the **Job Duties** column on the **Training Plan Details** section.

3

Next, determine how frequently the specific job duties and/or tasks will be performed, such as: Daily, Weekly, Monthly, or Occasionally. It is OK to be general with respect to frequency as this measurement will help the Department of Labor Business Service Representative determine, with the business, how many hours of training a New Hire should receive with respect to each specific job duty.

4

As you work through the list of document job duties, input the frequency for each in the **Frequency** column.

5

Then, for each job duty, document the **Training Method** in the respective column. It is helpful to be as detailed as possible to provide context on how the New Hire will learn the essential skills necessary to successfully perform each job duty.

For example, if the job duty is **System Installation**, the business may want to articulate that the New Hire will partner with an experienced Installer for 4 hours each day, for two weeks. After each day, the New Hire will sit with the experienced Installer and manager to review progress and evaluate performance.

Business should also document, as part of the **Training Method** any off-site live or self-paced training the New Hire will receive from the business or outside entities (e. g., manufacturers/distributors) as part of their role as well.

6

Lastly, list the number of hours per job duty and corresponding training your new hire will spend learning each task. This must be a thoughtful breakdown of hours. The total number of OJT hours shown must equal eligible hours for the program: 960 hours for a members of priority populations and disadvantaged communities (as defined by [PON 3982](#)) and 640 hours for individuals who are not members of priority populations or disadvantaged communities.

In the example I provided in the step above, 4 hours each day for two weeks would equate to 40 hours of On-the-Job training for **System Installation**.

#	Job Duties	Frequency	Training Method	OJT Hours
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
			Total OJT hours	

Section 3

Section 3: New Hire Acknowledgement

 Section 3 requires the New Hire to acknowledge the details of the Training Plan.

1

Once the Training Plan details are developed in conjunction with the Department of Labor Business Service Representative, the business should meet with the New Hire to review the plan or send them the training plan electronically and discuss it via phone or video call.

2

After reviewing the Training Plan with the New Hire, the business should have them sign and date the Training Plan certifying that they have reviewed the Training Plan with the business and that the New Hire is not related to any of the business owners, principals, or hiring managers of the business.

New Hire Acknowledgement

I, the undersigned New Hire, acknowledge this training plan for my On-the-Job Training Period. I certify that the I am not a relative of the business owners, principals, or hiring managers of the business at which I will be hired, as the word "relative" is defined in the PON.

New Hire Signature: _____

New Hire Name: _____

Date: _____

Section 4

Section 4: NYS DOL BSR Acknowledgement



The last section of the Training Plan must be completed by a Department of Labor representative assigned to your business.

1

After completing the first three sections of the Training Plan as outlined above, the business should email the Training Plan to their Department of Labor contact to review the Training Plan and complete the final section.

2

If there are issues with the Training Plan, your Department of Labor representative will reach out to discuss how to proceed.

New York State Department of Labor Business Service Representative Acknowledgment

OSOS ID:	O*Net Code:
Priority Population / Disadvantaged Community Category (if applicable)	
Verification Documentation Type (if applicable)	
Business Service Representative Signature:	
Business Service Representative Name:	
Date	

3

Next Steps

Next Steps

1

Once the Training Plan has been completed and signed off by both the New Hire and the Department of Labor representative, it should be uploaded in the **Required Documents** section of the On-the-Job Training application. Details on how to upload this Training Plan can be found on the **Application Page 4: Project Documents** tab of the [Submit an On-the-Job Training Application](#) page.

[Clean Energy Internship & OJT Training Business User Guides Home](#)