

# Instructions for VEEP Reporting Documents

## GENERAL INSTRUCTIONS

VEEP Quarterly reporting consists of the following parts:

Financial Report and Narrative Form

- Due quarterly according to the schedule below until the grant has been closed.
- The forms may also be submitted up to monthly for reimbursements.
- The financial form is available in excel, the narrative form is available in fillable PDF.
- The narrative must be completed for any reimbursement request.

Over the course of the grant award, the following reports will be required as tasks are completed:

1. Benchmarking Form
2. Initial Audit Form
3. Work Plan (AEA will review and approve)
4. Implemented Measures Report
5. Operations and Maintenance Plan(s)
6. Input project data into the Energy Efficiency Map
7. Close-out Project Narrative Report

Forms and guidance for these reports are available at AEA's web site:

<http://www.akenergyauthority.org/programs/alternativeVEEP.html>

If you have questions about submitting your reports, please contact:

Rebecca Garrett,  
Alaska Energy Authority  
(907) 771-3042  
[rgarrett@aidea.org](mailto:rgarrett@aidea.org)

## Submitting Reports

The **Financial Report/Request for Reimbursement Form** should be signed and faxed to (907) 771-3930 (a fax number dedicated to the VEEP project). The Narrative form can be emailed to [veep@aidea.org](mailto:veep@aidea.org).

## Quarterly Reporting Deadlines

January 15, 2014 First quarterly report due

April 15, 2014

July 15, 2014

October 15, 2014 Work plans must be submitted to AEA for approval

January 15, 2015

April 15, 2015

July 15, 2015

October 15, 2015

January 15, 2016

April 15, 2016

July 15, 2016

October 14, 2016

October 31, 2016 Construction must be completed

December 30, 2016 Final reports and grant closeout, if not completed sooner

## **INSTRUCTIONS FOR FINANCIAL REPORT/REQUEST FOR REIMBURSEMENT FORM**

1. Grantees must use the Excel financial report form provided on the web site. The Excel form automatically calculates the line totals, provides consistent reporting, and helps move the reimbursement requests through the finance department.
2. Enter identifying information on the Financial Report sheet: Grantee name, grant number, reporting dates, etc.
3. Enter financial information. The totals will calculate automatically. Complete all the fields that are applicable to the individual project.
4. Print, sign and email or fax the financial report to the number provided above.
5. Include supporting documentation (receipts, etc.)\* in the faxed or scanned and emailed report. Alternatively, the report may be mailed, but must arrive by the quarterly deadline.

\*AEA requires invoices and proof of payment for reimbursement and documentation for a cost match. For personnel, this includes timesheets and cost per hour.

## **INSTRUCTIONS FOR NARRATIVE PROGRESS REPORT**

1. Complete the Narrative report fillable PDF form provided on the web site.
2. Enter sufficient information in the narrative so that program managers can understand the project status. The narrative text boxes will expand to fit the text entered.
3. It is preferred to have this form emailed to [veep@aidea.org](mailto:veep@aidea.org) or [rgarrett@aidea.org](mailto:rgarrett@aidea.org). If you cannot email the form be sure that all narrative text entered is visible when printed.
4. The final report will also be submitted using this form, but will summarize the entire project.

## **INSTRUCTIONS FOR BENCHMARKING FORM**

It is strongly preferred that grantees submit the Benchmarking Form report via email using the provided Excel spreadsheet.

1. Each building that receives an energy audit under the VEEP program must have a completed Benchmarking form.
2. This form includes an instruction sheet tab for clarification when filling out the form.
3. This form may be sent directly to AEA from the Service Provider or Grantee Contractor.
4. **This form is due to AEA when the work plan is submitted for approval.**

## **INSTRUCTIONS FOR INITIAL AUDIT REPORT FORM**

It is strongly preferred that grantees submit the Initial Audit Report Form report via email using the provided Excel spreadsheet.

1. Each building that receives an energy audit under the VEEP program must have a completed Initial Audit Report form.
2. This form includes an instruction sheet tab for clarification when filling out the form, as well as a sample form to review.
3. This form may be sent directly to AEA from the Service Provider or Grantee Contractor.
4. **This form is due to AEA when the work plan is submitted for approval.**

### **INSTRUCTIONS FOR THE SAMPLE WORK PLAN**

**Work plans are due to AEA for approval no later than October 31, 2014.** A sample work plan is available on the web site however grantees are not required to use the sample format.

1. The grantee or service provider must submit a work plan to AEA prior to October 31, 2014. AEA will send approval of the work plan via email.
2. Construction can not start until the work plan has been approved.
3. This form may be sent directly to AEA from the Service Provider or Grantee Contractor.

### **INSTRUCTIONS FOR IMPLEMENTED MEASURES REPORT FORM**

It is strongly preferred that grantees submit the Implemented Measures Report Form report via email using the provided Excel spreadsheet.

1. The Implemented Measures Report Form will only be filled out for buildings where energy efficiency measures are installed.
2. This form includes an instruction sheet tab for clarification when filling out the form, as well as a sample form to review.
3. This form may be sent directly to AEA from the Service Provider or Grantee Contractor.
4. **This form is due to AEA when construction is complete in the building the report refers to.**

### **INSTRUCTIONS FOR OPERATIONS AND MAINTENANCE PLAN**

It is strongly preferred that grantees submit the Operations and Maintenance plan via email.

1. Please see the form on our web page that details what is needed for the O&M plan.

### **INSTRUCTIONS FOR ENERGY EFFICIENCY MAP**

<http://www.akenergyefficiencymap.org> It is the intended that communities will upload their building data to the EE MAP. The map is currently under construction so instructions for this activity are not available. All grantees will be contacted directly if/when the map is ready.

### **INSTRUCTIONS FOR NARRATIVE CLOSE OUT REPORT**

It is strongly preferred that grantees submit the Narrative Close Out Report via email.

1. The Narrative Close Out Report can be a longer version of the quarterly report, or a separate report in a word or PDF document.
2. This report should include before and after photos of the project.
3. This form may be sent directly to AEA from the Service Provider or Grantee Contractor.
4. **This report is due to AEA when construction is complete and the grantee is submitting their final invoice.**