

Instructions for Alaska Small Cities EECBG Quarterly Reports

GENERAL INSTRUCTIONS

Alaska Small Cities EECBG reporting consists of the following four parts:

1. Financial Report and Request for Reimbursement Form
 - Due quarterly according to the schedule below until the grant has been closed.
 - The form may also be submitted up to monthly for reimbursements.
 - The form also contains a narrative section to describe the work accomplished.
2. Metrics Report
 - This form is used to report energy savings, jobs created/retained and other performance metrics.
 - Due quarterly according to the schedule below until the grant has been closed.
3. Job Calculation Report
 - This form tracks the job hours worked by employees paid with ARRA funds only and their titles.
 - Due quarterly according to the schedule below until the grant has been closed.
4. Entering Building Energy Use Data in "Portfolio Manager"
 - Enter building utility bills into this web-based system, and allow AEA as the user to obtain the information.
 - The web site is provided by US EPA and is called "Portfolio Manager".
 - Update when quarterly reports are due, or monthly when your utility bills arrive.

All of these forms are available at AEA's web site: <http://www.akenergyauthority.org/eecbg.html>

If you have questions about submitting your reports, please contact Rebecca Garrett, Alaska Energy Authority, (907) 771-3042, rgarrett@aidea.org.

Submitting Reports

The **Financial Report and Request for Reimbursement Form** should be signed and faxed to (907) 771-3930 (a fax number dedicated to the EECBG project).

The **Metrics Report Form** and the **Jobs Report Form** should be emailed to eecbg@aidea.org. Please start the subject line with your city name.

Portfolio Manager: No form needs to be submitted to AEA, just update online by the quarterly deadlines, and report the last date updated on the Metrics Report.

Quarterly Reporting Deadlines

June 15, 2010 First quarterly report due, except for Portfolio Manager

September 15, 2010 Second quarterly report due, first Portfolio Manager entries due.

December 15, 2010

March 15, 2011

June 15, 2011

September 15, 2011

December 15, 2011

March 15, 2012

June 15, 2012

August 31, 2012 Deadline for all work to be completed

September 14, 2012 Final reports and grant closeout, if not conducted sooner"

INSTRUCTIONS FOR FINANCIAL REPORT AND REQUEST FOR REIMBURSEMENT FORM

1. It is preferred that grantees use the Excel report provided on the web site. The Excel form automatically calculates the line totals and has some other benefits. If Excel does not work as well for any reason, grantees may use the supplied PDF format. If using Excel, please note that the form has two sheets, the Financial Report and the Narrative Report.
2. Enter identifying information on the Financial Report sheet: City name, grant number, reporting dates, etc.
3. Indicate whether this is the final report.
4. Enter financial information. The totals will calculate automatically (Excel version only). Complete all highlighted fields.
5. Complete the Narrative section on the "Narrative Report" tab, which can be found at the bottom of the window. The identifying information at the top will fill in automatically once entered on page 1.
6. Enter sufficient information in the narrative so reviewers can understand the project status. The narrative text boxes will expand to fit the text entered, up to 5 inches high (Excel version). This will limit the text that is visible when printed and faxed. If additional space is needed, please attach extra pages to the fax. Make sure all text is showing prior to faxing.
7. Print, sign and fax both the financial report and narrative pages to the number provided above.
8. Include supporting documentation (receipts, etc.) in the faxed report. Alternatively, the report may be mailed, but must arrive by the quarterly deadline.

INSTRUCTIONS FOR METRICS FORM

It is strongly preferred that grantees submit the Metrics Form report via email using the provided Excel spreadsheet. If this is not possible, we have also provided a PDF document that can be typed into or neatly hand written and faxed back.

1. Identifying information: enter grantee name, grant number and dates.
2. Jobs
 - a. Enter the hours worked on this project in the reporting period, identifying the grant-funded (ARRA funded) jobs separately from all other funding sources.
 - b. Please note that the ARRA-funded number of hours (top box on this Metrics Form) should match the total number in the Job Calculation Report, since the job calculation report tracks only the ARRA-funded jobs, whereas the metrics form asks for both ARRA-funded and non-ARRA-funded hours of work.

Building Energy Audits

- Report the number of building energy audits conducted to date since the beginning of the project.
- The energy savings projections should reflect the total energy savings identified by the auditor(s) on the buildings audited to date. As more buildings are audited in subsequent quarters, the new information should be reported with the prior quarter's information to always provide a total of the energy savings identified to date since the beginning of the project. As the energy efficiency measures are implemented, report the savings in the "Annual Energy Savings" section. This will not double-count the savings, since the audit section reflects potential energy savings, and the Energy Savings section identifies actual (or estimated) savings.

Annual Energy Savings

- Report the annual energy savings created due to energy efficiency and conservation measures performed to date since the beginning of the project. These savings should align with the projects described in the narrative section of the Financial Report.
- Please do your best to accurately estimate the energy savings achieved from the activities conducted.
- If additional assistance is needed to calculate energy savings, the US Department of Energy has established a **Recovery Act Benefits Calculator**: <http://www1.eere.energy.gov/wip/guidance.html>. This may be used as a backup if no specific site energy savings estimate is available. The same web page also provides a technical assistance link for State and Local governments: <http://www1.eere.energy.gov/wip/assistance.html#sep>.

Workshops, Education and Energy Conservation

- List the number of building energy policies adopted, workshops or other trainings on energy efficiency and conservation that are associated with the grant activities.

Building Energy Use Data

- List the date the most recent utility data was entered in EPA's Portfolio Manager web database for all the buildings being retrofitted using this EECBG funding. The date entered should reflect that the most recent energy utility bills have been entered into Portfolio Manager.

Greenhouse Gas Emissions and other Criteria Pollutants

- Alaska Energy Authority will convert your energy savings data into greenhouse gas emissions reduced and criteria pollutants reduced for reporting to the federal government. If your projects reduce these emissions in ways other than through energy savings, please give details in the notes section.

Additional Notes

- This is optional space to note special circumstances, methods of estimation, other greenhouse gas emissions or criteria pollutants reduced, or any other notes.

INSTRUCTIONS FOR PORTFOLIO MANAGER (FOR TRACKING ACTUAL BUILDING ENERGY USE)

General Instructions

- All EECBG grantees are required to track their energy use through Portfolio Manager, going back at least one year prior to project implementation, and preferably two years. By following the setup instructions below, your information will be shared with AEA and you will not need to print or submit this information during quarterly reports. Your information must be up to date at the time of every quarterly report (starting Sept. 2010) for the report to be considered complete.
- We encourage cities to continue to use Portfolio Manager beyond the scope of this grant to measure the results of this program and to be better in tune with energy use. We also encourage any buildings that receive an Energy Star score above 75 to register the result to be recognized as an Energy Star Building.
- Portfolio Manager offers a variety of training and learning options at their web site: http://www.energystar.gov/index.cfm?c=business.bus_internet_presentations.

Initial Setup (Portfolio Manager)

1. Create an account in Portfolio Manager to track your buildings' energy use
 - a. Go to http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager
 - b. In the 'Portfolio Manager Login' box (right side), click the "Register" button.
 - c. Fill in your desired username, password, and other information. At the bottom, do **not** select the 'Master account' feature
 - d. Login with your new username

2. Share your account with AEA
 - a. On the 'My portfolio' page, click "share facilities," the fourth link down on the right hand column of links.
 - b. On the 'share facilities page', enter **akenergy** into the "portfolio manager username" box. Click 'Add and Modify'.
 - c. The new page should read "Select Access Rights for Sean Skaling – Alaska Energy Authority".
 - d. Under 'STEP 2', select 'facility editor'. Under 'Optional Rights' select 'Yes' for 'Can this user set a baseline'. Select 'No' for the other two questions.
 - e. Under 'Step 3' select 'EECBG' from the pull-down menu. Press continue.
 - f. On the next page, under step 4 of the 'share facilities page', check the boxes for all facilities under the EECBG Grant. You may also voluntarily add additional facilities to share for state-wide baseline energy data collection. Press continue.
 - g. Proceed past the next two pages, pressing "save" and "return"

3. Add your facilities- Note: A facility is different than a building. Multiple buildings can be entered under one facility page, or they can be added separately.
 - a. On the 'My portfolio' page, click "add a property" at the top of the right-hand column of links
 - b. Fill in appropriate facility information on the next 2 pages, then at the bottoms click 'continue' on the first page, and 'save' on the second.
 - c. Please start the facility name with the city name, then the building name (e.g. Adak, City Hall')

4. Add spaces and meters to your facility- Note: Multiple meters may tie into the same space.
 - a. Go to your facility portfolio, and click a facility name. This will take you to the 'facility summary'
 - b. The first step is to create 'spaces,' which are buildings or other energy consuming spaces. Go to 'space use' and select 'add space.'
 - c. Fill in the appropriate information on the next two pages, hitting "continue" and "save" respectively at the bottoms of the pages.
 - d. Next, select 'add meter', and fill in the appropriate information. Include which spaces the meter is tied to. After hitting "save," the site will direct you to enter in your monthly meter information. Further instructions for data entry is in the next section down in these instructions. Please be sure to enter all the energy meters for your facilities (heat and electric). Water meters are optional under this grant program, but may be useful for you to track.

Entering Energy Usage in Portfolio Manager (at least quarterly)

1. Log in to your account
2. If more than one facility is in your Portfolio Manager account, click on the facility for which you will enter energy use.
3. Scroll down to the 'Energy Meters' section.
4. Click on the meter name for which you will add energy use data.
5. Click on 'Add Meter Entries'.
6. Under 'Meter Entries to Add' enter the number of months that will be added now and the start date. Please enter approximately two years of energy data prior to the implementation of this grant (one year at a minimum).
7. Follow the prompts to add the dates and energy usage. Please include cost information too. Click 'Save'.
8. With at least 12 months of data, you are welcome to set an Energy Baseline against which to measure your energy use improvements. Your building will also generate an automatic Energy Star score (0 to 100) to illustrate how your building compares to similar buildings in a similar climate. Scores of 75 and above qualify your building for the Energy Star recognition.