

U.S. DEPARTMENT OF
ENERGY

Office of
ENERGY EFFICIENCY &
RENEWABLE ENERGY

WELCOME TO THE STATE ENERGY PROGRAM



Welcome

Welcome to the Department of Energy's State Energy Program (SEP).

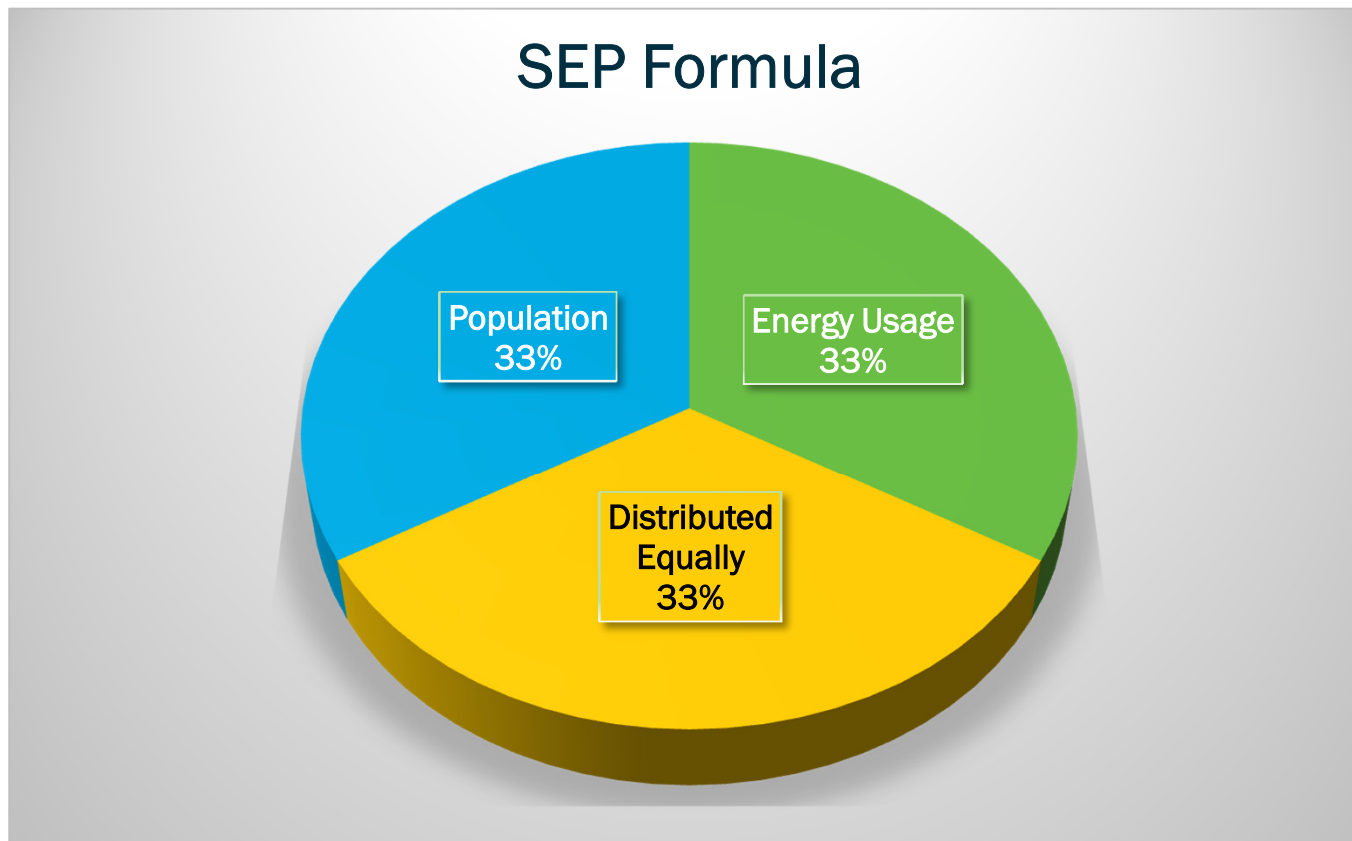
You are part of a national program comprised of 50 States, 5 territories, and the District of Columbia, who together have received more than \$300 million since 2010 and are addressing your states energy needs and opportunities everyday.

SEP emphasizes the State's role as the decision maker and administrator for program activities within the state that are tailored to your unique resources, delivery capacity, and energy goals.

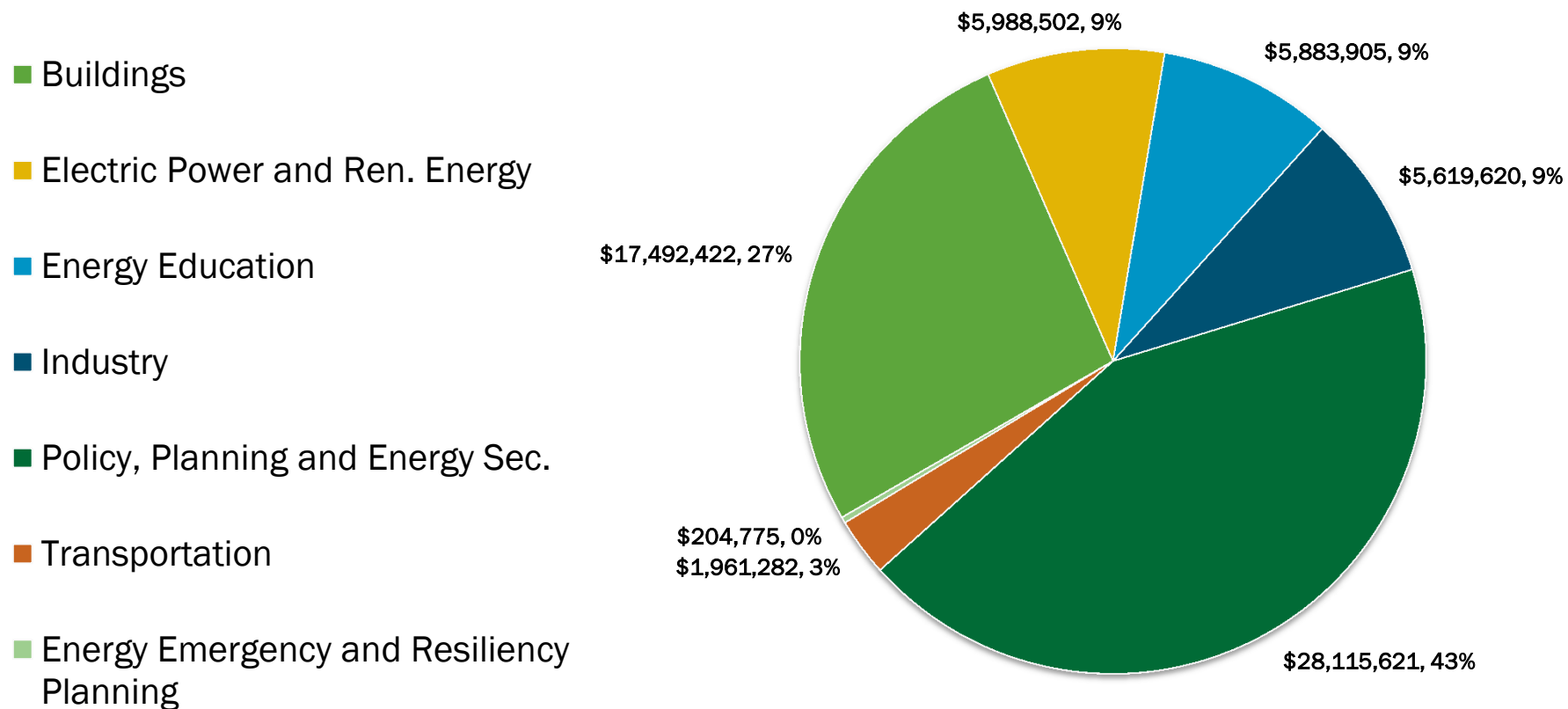
We look forward to working together.

What is the “Formula” in Formula

The total annual formula funds available to the program are allocated to states when above \$25.5M according to the following formula:



Where are States Spending Their Funding



PY18

What We Have Achieved Together Since 2010

Reduced energy waste in 40,000+ buildings (187M square feet) through energy efficiency upgrades

Installed 90,000+ renewable energy systems (9.7 million kilowatt hours)

Educated >2.9 million people in performing energy audits and upgrades

Understanding Roles & Responsibilities

State SEP Manager

Submits Annual SEP Application

Submits Annual State into Performance and Grants in Energy (PAGE).

The State Application consists of:

- Standard Form 424 (application),
- Standard Form 424A (budget),
- Budget Justification,
- Master File,
- Annual File,
- Link to the state's latest A-133 audit,
- Indirect Rate Agreement (if applicable),
- Certifications
- Assurance that there is an Emergency Assurance Plan in place

DOE Project Officer

Reviews Annual SEP Application

The Project Officer works with the Procurement Office to review the application.

If necessary, additional information may be requested or a call setup to negotiate any aspect of the application prior to award.

Finally, a technical evaluation is completed by the Project Officer and is submitted to the DOE Procurement and Contracting Team for Contracting Officer approval.

Understanding Roles & Responsibilities

State SEP Manager

Manages Program and Projects

Oversee the day-to-day implementation of programs and projects as specified within the State's annual file. This includes setting goals or milestones to ensure the desired outcomes are achieved within the 12 month budget period.

DOE Project Officer

Manages Grants

Oversees the states progress typically through regularly scheduled calls as well as frequent interaction via email for the purpose of providing guidance and technical assistance.

Understanding Roles & Responsibilities

State SEP Manager

Submit Reports in PAGE

The SEP Manager (or designee) will submit the quarterly financial, programmatic, and, if required, financial programs report thirty days (30) after the end of the quarter. A historical preservation report and, if necessary, a Davis Bacon report will also need to be submitted.

DOE Project Officer

Review Reports in PAGE

The Project Officer will review all reports within thirty days (30) after the reports are submitted. The project officer may reject the report multiple times, even after approval, to have the grantee make corrections or update data.

The Project Officer reviews items such as expenditures vs. performance, drawdowns, and cost match, in addition to qualitative and quantitative information.

Understanding Roles & Responsibilities

State SEP Manager

Monitor sub-recipients

Monitor awards to sub recipients following your method listed in the Master File.

DOE Project Officer

Monitor Grantees

Monitor grantees' progress through conferences calls, e-mails, tracking milestones, and reviewing the accomplishments in PAGE while comparing that to money spent.

Understanding Roles & Responsibilities

State SEP Manager

On-site and Financial Monitoring

Travel to on-site projects to ensure work is in compliance and done in a timely manner. Also making sure that state and federal regulations are being followed.

The manager should also make sure that the state's financial process and the federal rules on how federal funds are spent are being followed.

DOE Project Officer

On-Site and Financial Monitoring

The project officer will travel to the state at least once every three years to do an on-site visit. This will include an office visit and potentially on-site project visits. Prior to the visit the grantee will be given a tentative agenda and will provide the project officer.

- Organizational/management structure
- Sample sub-recipient report
- Administrative/program policies/procedures
- Completed, to the extent possible the on-site monitoring instrument

Understanding Roles & Responsibilities

State SEP Manager

Success Stories/ Best Practices

Submit success stories to your DOE Project Officer using the success story template to highlight your successes and provide examples and possible replicable models for other states. Request the success story template from your DOE Project Officer.

Provide a picture to accompany the success story.

DOE Project Officer

Success Stories/ Best Practices

Encourage grantee to submit success stories and review submitted ones.

Convert the success story template to a more readable friendly story.

Post success story on the [SEP webpage](#).

FY vs. PY - Know The Difference?

What is the difference between a Fiscal Year (FY) and a Program Year (PY)?

Fiscal Year

Federal fiscal years start October 1st and end September 30th. (October 1st, 2019 will start FY20).

Program Year

Program year (PY): Each state selects a 12-month program year that usually corresponds with the state's fiscal year.

Although the state's program year may start during the federal fiscal year, it can extend beyond the federal fiscal year. (e.g., July 1st, 2019 – June 30th, 2020).

Deadlines for Applications – PY19

Program Year Ending

- June 30, 2019
- August 31, 2019
- September 30, 2019

Application Due Date

- April 30, 2019
- May 10, 2019
- May 24, 2019

To ensure timely processing of awards, application documents are due 90-days prior to the PY start.

Federal Regulations At A Glance

Recipient Type	State & Local Government	Non-Profit Organization	Educational Institutions	Commercial (For-Profit) Organizations
Administrative Requirements	2 CFR Part 200 as amended by 2 CFR Part 910	2 CFR Part 200 as amended by 2 CFR Part 910	2 CFR Part 200 as amended by 2 CFR Part 910	2 CFR Part 200 as amended by 2 CFR Part 910
Cost Principles	2 CFR Part 200 Subpart E	2 CFR Part 200 Subpart E	2 CFR Part 200 Subpart E	FAR Part 31 (48 CFR Part 31)
Audit	Single Audit	Single Audit	Single Audit	Compliance Audit

Other Relevant Laws, Regulations, and Authorities

- Public Law 95-224: [Federal Grant and Cooperative Agreement Act \(FGCAA\)](#)
- Public Law 106-107: [Federal Financial Assistance Management Improvement Act](#)
- [Energy Policy Act of 2005](#) and [Energy policy Act of 1992 \(EPAct\)](#)
- [Code of Financial Regulations \(CFR\)](#)

MODIFICATION: PROJECT OFFICER APPROVAL

States are authorized to transfer funds among direct cost categories for program activities consistent with their approved State Application, without prior approval of the Contracting Officer. Recipients are required to submit written notification to the Project Officer of any transfer of funds among direct cost categories (excluding indirect) which exceed or are expected to exceed ten percent of the current total approved budget. These steps should be followed:

1. Notify Project Officer
2. Make a revision in PAGE to show the changes (i.e. show the money moving between budget categories)
3. Submit the revision change in PAGE
4. Project Officer will review and approve/reject in PAGE

MODIFICATION: CONTRACTING OFFICER APPROVAL

Any change in scope or indirect rate, or the addition of a market title will require Contracting Officer approval. When this type of modification is needed, States need to do the following:

1. Notify Project Officer
2. Make a revision in PAGE to show the changes (i.e. show the new market title with associated budget changes)
3. Submit the revision change in PAGE

The Project Officer will review the revision and once complete send all information to the Procurement Office for review and signature. Once the modification has been signed, there will be new award documents indicating the modification number and the Project Officer will approve the revision in PAGE.

MODIFICATION TO EXISTING AWARD

TYPE OF MODIFICATION	CONTRACTING OFFICER APPROVAL?	PROJECT OFFICER NOTIFICATION
Change in scope	YES	YES
Change in Indirect rate/amount	YES	YES
Movement of funds between budget categories, excluding indirect cost	NO	YES
Addition of market title	YES	YES
Change in metric of existing market title	NO	YES
True up of carryover numbers	NO	YES

CLOSEOUT OF AWARD-RECIPIENT RESPONSIBILITIES

- 1. Final reports submitted in PAGE and checked final**
 - Reviewed for accuracy
- 2. Annual Summary reports submitted**
- 3. Other Competitive report/deliverable as stated in your FARC**
- 4. Letter stating de-obligation amount, if applicable**
- 5. Property Certification completed**
 - SF 428 and SF428b

EXTENSIONS TO EXISTING AWARDS

Extensions to existing awards will not be authorized except in cases of extraordinary circumstances. It is DOE's expectation that States will spend out their entire DOE award by the end of the 3rd year. However, DOE will consider extension requests for extraordinary circumstances. Extraordinary circumstances include the loss of personnel for an extended period of time where a significant portion of the budget is allocated to personnel costs; change in leadership resulting in a significant change in program plans that significantly delays spending; a significant (over three months) freeze on spending; or a natural disaster. No more than one extension per award will be considered.

Need Some Guidance

State Energy Program Guidance

Home » State Energy Program » State Energy Program Guidance

For more than 30 years, the U.S. Department of Energy's (DOE) State Energy Program (SEP) has provided funding and technical assistance to states, U.S. territories, and the District of Columbia. State Energy Offices use SEP funds to develop state plans that advance energy solutions through regional networks, strategic energy planning, executive orders, legislation and local ordinances, management of local retrofits, and land-use plans. The SEP Operations Manual is a reference tool for the SEP network states and program officials within DOE. This manual contains information needed to administer the State Energy Program.

[Download the SEP Operations Manual.](#)

SEP released the following guidance documents, listed chronologically below, that explain how states must report and manage SEP program funding. More program guidance documents are available on the [Recovery Act Guidance by Topic](#) page.

2019 Program Guidance

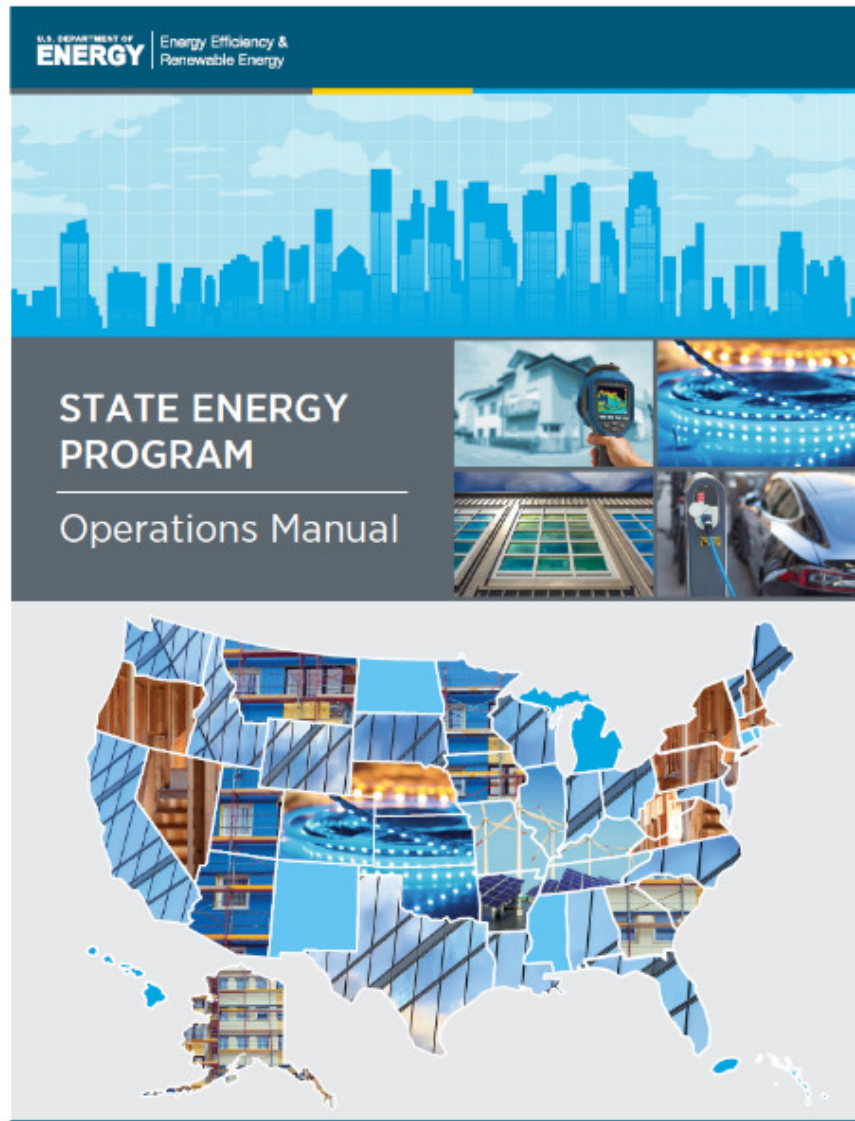
- [SEP Program Notice 10-006E: DOE Reporting Requirements for the State Energy Program – Effective March 31, 2019](#)
- [SEP 2019 Administrative and Legal Requirements Document \(ALRD\) – Issued March 1, 2019 – This ALRD is to solicit the annual grant applications under State Energy Program for Program Year 2019.](#)
- [Program Year 2019 State Energy Program Formula Grant Guidance 19-01 – Effective March 1, 2019](#)
- [Annual Summary Template PY19](#)
- [Letter to Grantees Regarding Maintenance of Records to Document Work Performed to Support SEP Grant Activities – Issued Jan. 22, 2019 – This letter reminds grantees of the requirement to maintain records that accurately reflect the work performed by grantees to support SEP grant activities.](#)

2018 Program Guidance

- [SEP 2018 Administrative and Legal Requirements Document \(ALRD\) \(Modification 0001\), Modified June 26, 2018 – This ALRD is to solicit the annual grant applications under SEP for Program Year](#)

- If you have any questions regarding reporting and managing SEP program funding, look at the guidance documents on the [SEP Program Guidance Webpage](#)
- Guidance dates back to 2009 and includes:
 - Administrative and Legal Requirements Documents (ALRDs);
 - State Energy Program Formula Grant Guidance;
 - A Letter to Grantees Regarding Maintenance of Records to Document Work Performed to Support SEP Grant Activities;
 - Annual Summary Templates; and
 - NEPA Determinations.

Need Some Guidance



The SEP [Operations Manual](#) is a programmatic resource developed for you and other states who manage and oversee the implementation of the State Energy Program

Topics you can explore include:

- SEP Funding Sources and Federal Regulations
- Rules and Procedures for Formula Funding
- Program Administration: Monitoring & Reporting
- DOE Technical Assistance Resources
- Appendix: Fact Sheet, PVE Funding Overview, Success Story template, etc.

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Unraveling the Mysteries of Reporting in the Performance Accountability for Grants in Energy (PAGE) System

Robert Hu

August 2019



Training Outline

- **Quarterly Performance Report**
 - Let us know all the great things you accomplished in the last quarter
- **Federal Financial Report**
 - Tell us how you spent your funds in the last quarter
- **Financial Program Report**
 - Let us know what happened in your ARRA-funded financing programs last quarter
- **Semiannual Davis Bacon Report**
- **Annual Historic Preservation Report**
- **Data Exports**
 - How to export data from PAGE into spreadsheets

Quarterly Performance Reports

Home

Contact Us

My Profile

Help

Training Videos

Reference Library

FAQs

Submit Success Story

Logout

Home

Create New Application

Search

EECBG

SEP

Application Documents

Plan Workbook

Quarterly Performance Reporting

Quarterly Financial Reporting

Financial Programs Reporting

Semi-Annual Davis Bacon

Annual Historic Preservation

Reports

Data Exports to Excel

Grant Administration

SEP Special Projects

WAP

Miscellaneous Grants

User Management

Help Desk

Grant Search:

Grant #: EE0007484

Grantee: State of New Hampshire

Status: Active

State Energy Program

The State Energy Program (SEP) provides grants to states and directs funding to state energy offices from technology programs in DOE's Office of Energy Efficiency and Renewable Energy. States use grants to address their energy priorities and program funding to adopt emerging renewable energy and energy efficiency technologies.

Grant General Information

Grant Number:	EE0007484	Status:	Active
Program Code:	SEP	State:	NH
Project Start Date:	07/01/2016	Project End Date:	06/30/2017
Recipient Name:	State of New Hampshire		
DOE Project Officer:	Kelsie Bell kelsie.bell@eo.doe.gov		
Grantee Contact:	Richard Minard Richard.MinardJr@nh.gov		
Total Allocation:	\$329,220.00	Total Costs Reported:	\$194,950.01
Total Budgeted:	\$329,220.00	Total Payments:	\$200,360.28
Total Obligations:	\$329,220.00		

List of Grant-Related Reports:

Quarterly Performance Report

Federal Financial Report (SF-425)

Financial Programs Report (ARRA)

Quarterly Performance Reports

Quarterly Performance Reporting

The State Energy Program (SEP) Quarterly Performance Reports are due not later than 30 calendar days after the end of each quarter. The Quarterly Performance Reports contain activity level information on costs, milestones, metrics, and qualitative descriptions that combined provide a comprehensive view of activity progress.

Quarterly Performance Reports are submitted to, and approved by DOE via this page. After a grantee enters the performance information for all activities, simply check the "Ready for Approval" box on each, at which time a button will be displayed to sign and submit the Program Performance Report to DOE. After reviewing the Program Performance Report for each activity, DOE will follow the same process to approve or reject the submitted report.

Program Year: 2016

Budget Period: 07/01/2016 - 06/30/2017

Reporting Period: 01/01/2017 - 03/31/2017 Approved ☐ Final ☐



Create New

Project Title (Market)	Costs (DOE)	Ready For Submission
Building Improvements (Buildings)	Planned: \$68,013	<input type="checkbox"/>
	To Date: \$18,679	
	Work Complete: 0%	
Energy Education (Energy Education)	Planned: \$500	<input type="checkbox"/>
	To Date: \$501	
	Work Complete: 0%	
Energy Program Support (Policy, Planning and Energy Security)	Planned: \$256,707	<input type="checkbox"/>
	To Date: \$175,771	
	Work Complete: 0%	
Transportation (Transportation)	Planned: \$4,000	<input type="checkbox"/>
	To Date: \$0	
	Work Complete: 0%	

Quarterly Performance Reports

Milestones					
04/01/2017 - 06/30/2017 In-process (Building Improvements)					
Milestone(s)					
					ADD
Description	Planned Amount	Previously Reported	Actual Amount This Qtr	Actual Amount Cumulative To Date	Action
State Energy Database improvements: number of accounts reporting reliably	10	2	0	2	
State Energy Database improvements: percentage of accounts reporting reliably	85	80	0	80	

Required Metrics				
04/01/2017 - 06/30/2017 In-process (Building Improvements)				
Financial Metrics				
Source Of Funds	Previously Reported	This Quarter Outlays	Total Cumulative To Date	Action
Outlays				
Recipient				
DOE SEP	\$18,678.57		\$18,678.57	
STRIPPER	\$0.00		\$0.00	
Total Outlays :	\$18,678.57	\$0.00	\$18,678.57	
Process Metrics				
Metric Description	Group	Metric Item	Previously Reported	This Quarter
Clean Energy Policy				
Other policies developed or improved		Policies developed (count)	0	
		Policies improved (count)	0	

Federal Financial Report



Home	Contact Us	My Profile	Help	Training Videos	Reference Library	FAQs	Submit Success Story	Logout
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Home	Grant Search: <input type="text"/>
Create New Application	Grant #: EE0007484
Search <input type="button" value="v"/>	Grantee: State of New Hampshire
EECBG <input type="button" value="v"/>	Status: Active
SEP <input type="button" value="v"/>	
Application Documents <input type="button" value="v"/>	
Plan Workbook <input type="button" value="v"/>	
Quarterly Performance Reporting <input type="button" value="v"/>	
Quarterly Financial Reporting <input type="button" value="v"/>	
Financial Programs Reporting <input type="button" value="v"/>	
Semi-Annual Davis Bacon <input type="button" value="v"/>	
Annual Historic Preservation <input type="button" value="v"/>	
Reports <input type="button" value="v"/>	
Data Exports to Excel <input type="button" value="v"/>	
Grant Administration <input type="button" value="v"/>	
SEP Special Projects <input type="button" value="v"/>	
WAP <input type="button" value="v"/>	
Miscellaneous Grants <input type="button" value="v"/>	
User Management <input type="button" value="v"/>	
Help Desk <input type="button" value="v"/>	

State Energy Program

The State Energy Program (SEP) provides grants to states and directs funding to state energy offices from technology programs in DOE's Office of Energy Efficiency and Renewable Energy. States use grants to address their energy priorities and program funding to adopt emerging renewable energy and energy efficiency technologies.

Grant General Information

Grant Number:	EE0007484	Status:	Active
Program Code:	SEP	State:	NH
Project Start Date:	07/01/2016	Project End Date:	06/30/2017
Recipient Name:	State of New Hampshire		
DOE Project Officer:	 Kelsie Bell kelsie.bell@eo.doe.gov		
Grantee Contact:	 Richard Minard Richard.MinardJr@nh.gov		
Total Allocation:	\$329,220.00	Total Costs Reported:	\$194,950.01
Total Budgeted:	\$329,220.00	Total Payments:	\$200,360.28
Total Obligations:	\$329,220.00		

List of Grant-Related Reports:

- [Quarterly Performance Report](#)
- [Federal Financial Report \(SF-425\)](#)
- [Financial Programs Report \(AKR4\)](#)

Federal Financial Report

Quarterly Financial Reporting

The Financial Reporting Module is used by grantees to enter their expenditures via the Federal Financial Report (FFR), SF-425. The form and information to be used for expenditure reporting is dictated by grant guidance.



Reporting Period: 01/01/2017 - 03/31/2017 Approved Final ☐

View Create New 

Print / Export



Cumulative for: ☒ life of grant ☐ budget period  

Reporting Period: 04/01/2017 - 06/30/2017 In-process Final ☐

 **Note:** This report is not complete until it has been submitted to DOE 

View Validate Delete

Print / Export

Cumulative for: ☒ life of grant ☐ budget period  



Ready For Submission ☐ Sign and Submit

Federal Financial Report

Reporting Period: 04/01/2017 - 06/30/2017 In-process ▼


⚠ **Note:** This report is not complete until it has been submitted to DOE Validate

Print / Export

Cumulative for: ☒ life of grant ☐ budget period  

Federal Outlays Reported On The Quarterly Performance Report For This Period

PPR Status: Submitted

 Title(s) (show details...)	Activity Status	Previously Reported	This Period Outlays	Cumulative To Date
Total Outlays		\$194,950.01	\$450.00	\$195,400.01

- Reminder – Expenditures in the FFR MUST match the sum of the Market Titles' outlays from the QPR.

Federal Financial Report

10. Transactions

Federal Cash	Previously Approved	This Period	Cumulative
a. Cash Receipts	\$173,895.21	\$ 26,465.07	\$ 200,360.28
b. Cash Disbursements	\$194,950.01	\$ 450.00	\$ 195,400.01
c. Cash on Hand (line a minus b)	(\$21,054.80)	\$ 26,015.07	\$ 4,960.27

Federal Expenditures and Unobligated Balance	Previously Approved	This Period	Cumulative
d. Total Federal Funds Authorized			\$ 329,220.00
e. Federal Share of Expenditures	\$194,950.01	\$ 450.00	\$ 195,400.01
f. Federal Share of Unliquidated Obligations	\$17,081.36		\$ 17,081.36
g. Total Federal Share (sum of lines e and f)	\$212,031.37		\$ 212,481.37
h. Unobligated Balance of Federal Funds (line d minus g)			\$ 116,738.63

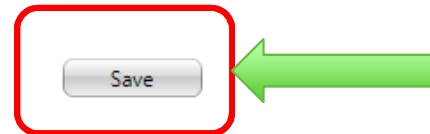
Recipient Share	Previously Approved	This Period	Cumulative
i. Total Recipient Share Required	\$65,844.00	\$ 0.00	\$ 65,844.00
j. Recipient Share of Expenditures (18% to date)	\$35,430.02	\$ 0.00	\$ 35,430.02
k. Remaining Recipient Share to Be Provided (line i minus j)	\$30,413.98	\$ 0.00	\$ 30,413.98

Program Income	Previously Approved	This Period	Cumulative
l. Total Federal Program Income Earned	\$0.00	\$ 0.00	\$ 0.00
m. Program Income Expended in Accordance with the Deduction Alternative	\$0.00	\$ 0.00	\$ 0.00
n. Program Income Expended in Accordance with the Addition Alternative	\$0.00	\$ 0.00	\$ 0.00
o. Unexpended Program Income (line l minus line m or line n)	\$0.00	\$ 0.00	\$ 0.00

Federal Financial Report

Program Income	Previously Approved	This Period	Cumulative
l. Total Federal Program Income Earned	\$0.00	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>
m. Program Income Expended in Accordance with the Deduction Alternative	\$0.00	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>
n. Program Income Expended in Accordance with the Addition Alternative	\$0.00	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>
o. Unexpended Program Income (line l minus line m or line n)	\$0.00	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>

Remarks



- Remember to hit the Save Button at the bottom of the page. If you do not hit save after making changes, then the Validate button will not take into account any changes made to the FFR.

Financial Programs Report



Home	Contact Us	My Profile	Help	Training Videos	Reference Library	FAQs	Submit Success Story	Logout
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Home	Grant Search: <input type="text"/>
Create New Application	Grant #: EE0007484
Search <input type="button" value="v"/>	Grantee: State of New Hampshire
EECBG <input type="button" value="v"/>	Status: Active
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State Energy Program

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Total Allocation:	\$329,220.00	Total Costs Reported:	\$194,950.01
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Total Obligations:	\$329,220.00		

List of Grant-Related Reports:

- [Quarterly Performance Report](#)
- [Federal Financial Report \(SF 425\)](#)
- [Financial Programs Report \(ARRA\)](#)**

Financial Programs Report



Financial Programs Reporting


Financial Programs Reports are due no later than 30 calendar days after the end of each period. The Financial Programs Report contains information on costs, metrics, and qualitative descriptions that combined provide a comprehensive view of financial programs (i.e., revolving loan funds and loan loss reserves).

Financial Programs Reports are submitted to, and approved by DOE via this page. After a grantee enters the performance information for all financial programs, simply check the "Ready for Submission" box on each, at which time a button will be displayed to sign and submit the Financial Programs Report to DOE.

After reviewing the Financial Programs Report for each program, DOE will follow the same process to approve or reject the submitted report.

For more information about the requirements of this report, please see the Reporting Guidance document series 10-006.

Reporting Period: 01/01/2017 - 03/31/2017 Approved  



 Create New


Active Financial Programs

Financial Program Title (Program Administered)	Program Size	Ready For Submission	Action
(1) Enterprise Energy Fund (Third Party)	\$4,188,295.81	<input type="checkbox"/>	

Financial Programs Report

Reporting Period: 04/01/2017 - 06/30/2017 In-process


 

 **Note:** This report is not complete until it has been submitted to DOE

Validate


Sign and Submit





Active Financial Programs

Financial Program Title (Program Administered)	ADD	Program Size	Ready For Submission	Action
(1) Enterprise Energy Fund (Third Party)		\$4,188,295.81	<input type="checkbox"/>	

Sign and Submit

Financial Programs Report

FINANCIAL METRICS SUMMARY (This section is pre-populated from information entered below in this report)		
Program Size		
Previous Program Size		\$4,188,295.81
+ Non-Principal Income (Including Interest and Fees)		\$0.00
+ Inter-Program Transfer		\$0.00
- Outlays		\$0.00
= Program Size		\$4,188,295.81
Funds Available		
Program Size		\$4,188,295.81
- Loans Given (cumulative to date)		\$6,133,856.00
+ Principal Repaid (cumulative to date)		\$2,761,620.35
= Funds Available		\$816,060.16

Financial Metrics (Funds)					
Description	Previously Reported	This Period	Cumulative To Date	Action	
Funds					
Non-Principal Income (Including Interest and Fees)	\$316,182.25		\$316,182.25		
Principal Repaid	\$2,761,620.35		\$2,761,620.35		
Inter-Program Transfers	\$0.00		\$0.00		
Total Funds	\$3,077,802.60	\$0.00	\$3,077,802.60		

Financial Programs Report

Financial Metrics (Funds) ?				
Description	Previously Reported	This Period	Cumulative To Date	Action
Funds				
Non-Principal Income (Including Interest and Fees)	\$316,182.25	<input type="text" value="\$ 0.00"/>	\$316,182.25	
Principal Repaid	\$2,761,620.35	<input type="text" value="\$ 0.00"/>	\$2,761,620.35	
Inter-Program Transfers	\$0.00	<input type="text" value="\$ 0.00"/>	\$0.00	
Total Funds	\$3,077,802.60	\$0.00	\$3,077,802.60	

* Required

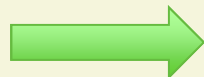


Save

Cancel

Financial Metrics (Outlays) ?				
Description	Previously Reported	This Period	Cumulative To Date	Action
Outlays				
Administrative Outlays	\$1,021,361.44	<input type="text" value="\$ 0.00"/>	\$1,021,361.44	
Total Loans Written Off (Pre-populated from metrics below)	\$0.00		\$0.00	
Total Grants Given (Pre-populated from metrics below)	\$1,729,626.00		\$1,729,626.00	
Total Outlays	\$2,750,987.44	\$0.00	\$2,750,987.44	

* Required



Save

Cancel

Financial Programs Report


Financial Metrics (Loans/Loans Supported by LLRs/Grants) (by sector)								ADD
Metric Description	Group	Metric Item	Previously Reported	This Period	Cumulative To Date	Action		
Loans								ADD
Loans given, in default, written off, fully repaid	Sectors: Commercial	Number of loans given (count)	32	0	32			
		Monetary value of loans given (\$)	\$6,133,856.00	\$0.00	\$6,133,856.00			
		Number of loans written off (count)	0	0	0			
		Monetary value of loans written off (\$)	\$0.00	\$0.00	\$0.00			
		Number of loans fully repaid (count)	8	0	8			
		Monetary value of loans fully repaid (\$)	\$1,502,933.00	\$0.00	\$1,502,933.00			
		Number of loans in default (count)	1	0	1			
		Monetary value of loans in default (\$)	\$398,620.12	\$0.00	\$398,620.12			
Grants (Including interest rate buy-downs, third-party insurance)								ADD
Grants given	Sectors: Commercial	Number of grants given (count)	33	0	33			
		Monetary value of grants given (\$)	\$1,729,626.00	\$0.00	\$1,729,626.00			

RLF - Loan Default Details

?

ADD

☐ Include statuses 'In-Compliance' and 'Written-off'

Recipient	Orig. Loan Amt. Loan Orig. Date	Amount in Default	Amt. of Last Pmt. Last Pmt. Date	Status	Action
	\$457,842.00 12/22/2011	\$398,620.12	\$2,316.15 06/15/2015	In-Default	
Total Amount in Default for 1 detail line with 'In-Default' status:		\$398,620.12			

i


For the 'Loans' metrics section, the sum of of 'Monetary value of loans in default' for all sectors = \$398,620.12; The total 'Number of Loans In Default' for all sectors = 1.


w

Note: Grayed-out data indicates previously reported information; use edit icon, if applicable, to update for this period.

U.S. DEPARTMENT OF ENERGY OFFICE OF ENERGY EFFICIENCY & RENEWABLE ENERGY 38

Financial Programs Report

Financial Metrics (Leveraged Funds) ?				
Description	Previously Reported	This Period	Cumulative To Date	Action
Leveraged Funds				
Value of private capital	\$0.00	\$0.00	\$0.00	
Total Leveraged Funds	\$0.00	\$0.00	\$0.00	

Process Metrics ? ADD						
Metric Description	Group	Metric Item	Previously Reported	This Period	Cumulative To Date	Action
Building Energy Audits ADD						
Building energy audits, by sector	Sectors: Commercial	Audits performed (count)	25	0	25	
		Floor space audited (sq.ft.)	1,175,400	0	1,175,400	
		Auditor's projection of energy savings (kWH)	3,082,112	0	3,082,112	

Semi-Annual Davis Bacon Report

Semi-Annual Davis Bacon Reporting

DOE financial assistance Recipients must comply with the Davis-Bacon and Related Acts as a condition of spending DOE funds. Among other Davis-Bacon requirements, Recipients must report semi-annually to DOE regarding their oversight of Davis-Bacon compliance and enforcement. These reports are due within 25 calendar days following the end of the semi-annual reporting period.

The semi-annual report is submitted to DOE via this webpage. After a Recipient enters the information, simply click on the "submit" button below to submit the report to DOE.

The Davis Bacon reports are available to be created in PAGE from the beginning of the semi-annual reporting period up to 25 days after the end of the reporting period. If errors have been made in reporting, Davis-Bacon reports can be withdrawn and resubmitted up to 25 days after the end of the reporting period. After the 25th day, the reporting cycle is closed and DOE begins compiling the Semi-Annual Enforcement Compliance report for submission to the Department of Labor (DOL) on the 1st day of the following month. If the grantee discovers an error after the 25th day, they may send a revised report to DBAEnforcementReports@hq.doe.gov with a copy to their Project Officer.

If you have PAGE related questions, please contact the PAGE hotline at PAGE-Hotline@ee.doe.gov.

Period Covered: 10/01/2016 - 03/31/2017 Approved

View Create New

- **Must submit two times a year in PAGE; reports are due 25 days after the end of the reporting periods.**
 - October 1st to March 31st
 - April 1st to September 30th

Semi-Annual Davis Bacon Report

Semi-Annual Davis Bacon Reporting


DOE financial assistance Recipients must comply with the Davis-Bacon and Related Acts as a condition of spending DOE funds. Among other Davis-Bacon requirements, Recipients must report semi-annually to DOE regarding their oversight of Davis-Bacon compliance and enforcement. These reports are due within 25 calendar days following the end of the semi-annual reporting period.

The semi-annual report is submitted to DOE via this webpage. After a Recipient enters the information, simply click on the "submit" button below to submit the report to DOE.

The Davis Bacon reports are available to be created in PAGE from the beginning of the semi-annual reporting period up to 25 days after the end of the reporting period. If errors have been made in reporting, Davis-Bacon reports can be withdrawn and resubmitted up to 25 days after the end of the reporting period. After the 25th day, the reporting cycle is closed and DOE begins compiling the Semi-Annual Enforcement Compliance report for submission to the Department of Labor (DOL) on the 1st day of the following month. If the grantee discovers an error after the 25th day, they may send a revised report to DBAEnforcementReports@hq.doe.gov with a copy to their Project Officer.

If you have PAGE related questions, please contact the PAGE hotline at PAGE-Hotline@ee.doe.gov.

Period Covered: 04/01/2017 - 09/30/2017 In-process





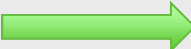
View

Validate

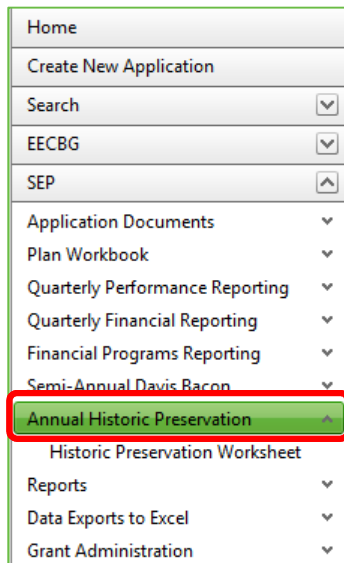
Delete

Sign and Submit

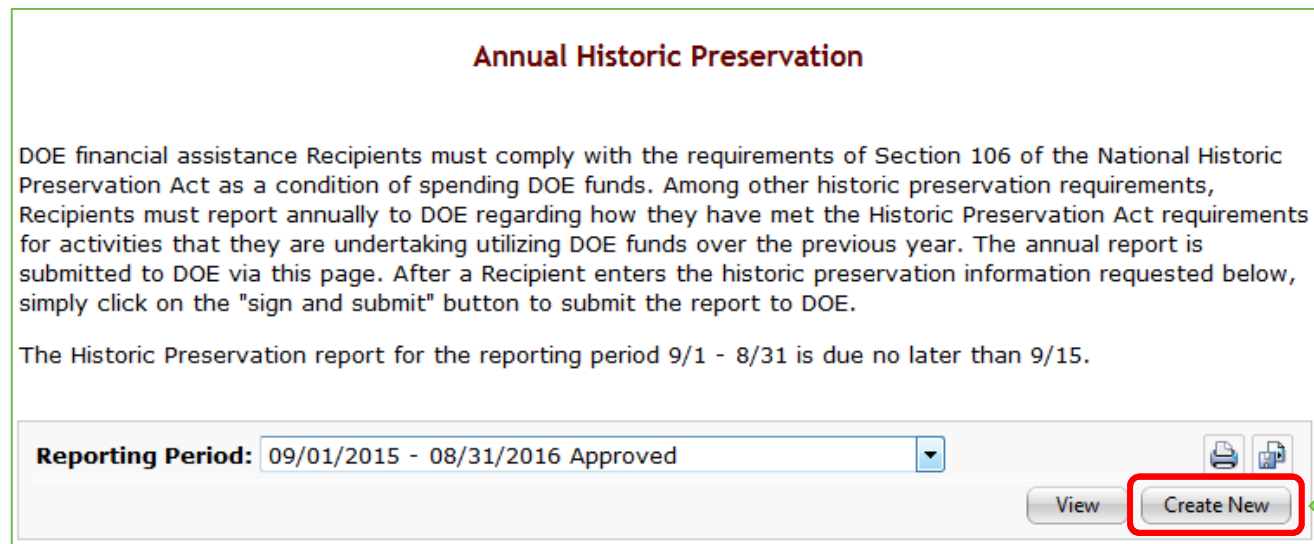
Semi-Annual Davis Bacon Report

1. Period Covered: 04/01/2017 - 09/30/2017 In-process		 
		<input type="button" value="Validate"/>
2.	Number of contracts awarded subject to Davis-Bacon and Related Acts:	<input type="text" value="0"/>
3.	Total dollar amount of contracts awarded Subject to Davis-Bacon and Related Acts:	<input type="text" value="\$ 0.00"/>
4.	Number of contractors/subcontractors against whom complaints were received:	<input type="text" value="0"/>
5.	Number of investigations completed:	<input type="text" value="0"/>
6.	Number of contractors/subcontractors found in violation:	<input type="text" value="0"/>
7.	Amount of wage restitution found due:	
	Davis-Bacon and Related Acts:	<input type="text" value="\$ 0.00"/>
	Contract Work Hours and Safety Standards Act: (Overtime Violations)	<input type="text" value="\$ 0.00"/>
8.	Amount of back wages paid:	
	Davis-Bacon and Related Acts:	<input type="text" value="\$ 0.00"/>
	Contract Work Hours and Safety Standards Act:	<input type="text" value="\$ 0.00"/>
9.	Total number of employees due wage restitution under the Davis Bacon and Related Acts and/or Contract Work Hours and Safety Standards Act:	<input type="text" value="0"/>
10.	Amount of liquidated damages assessed under Contract Work Hours and Safety Standards Act:	<input type="text" value="0"/>
		
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>

Historic Preservation Report



Home
Create New Application
Search
EECBG
SEP
Application Documents
Plan Workbook
Quarterly Performance Reporting
Quarterly Financial Reporting
Financial Programs Reporting
Semi-Annual Davis Bacon
Annual Historic Preservation
Historic Preservation Worksheet
Reports
Data Exports to Excel
Grant Administration



Annual Historic Preservation

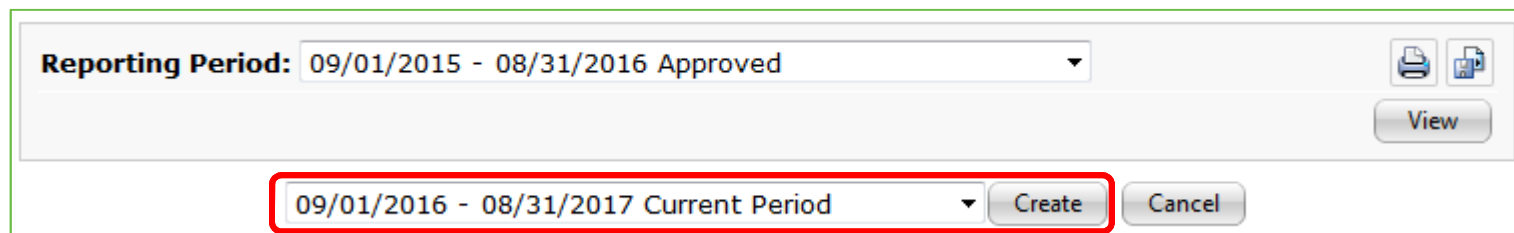
DOE financial assistance Recipients must comply with the requirements of Section 106 of the National Historic Preservation Act as a condition of spending DOE funds. Among other historic preservation requirements, Recipients must report annually to DOE regarding how they have met the Historic Preservation Act requirements for activities that they are undertaking utilizing DOE funds over the previous year. The annual report is submitted to DOE via this page. After a Recipient enters the historic preservation information requested below, simply click on the "sign and submit" button to submit the report to DOE.

The Historic Preservation report for the reporting period 9/1 - 8/31 is due no later than 9/15.

Reporting Period: 09/01/2015 - 08/31/2016 Approved

View Create New

- Reporting period is from September 1st to August 31st
 - Report is due no later than September 15th

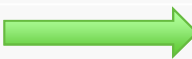


Reporting Period: 09/01/2015 - 08/31/2016 Approved

09/01/2016 - 08/31/2017 Current Period Create Cancel

Historic Preservation Report

Reporting Period: 09/01/2016 - 08/31/2017 In-process

 **View** Delete Create New

Sign and Submit

Reporting Period: 09/01/2016 - 08/31/2017 In-process


1a. State where recipient is located: **NH**

1b. Name of recipient: **State of New Hampshire**

1c. Have you utilized a U.S. DOE-executed Historic Preservation Programmatic Agreement (PA) in order to comply with National Historic Preservation Act requirements for all or some of your U.S. DOE-funded EECBG, WAP, or SEP activities?
☐ Yes ☒ No

1d. If your answer to 1c above is no, then for any activities for which you did NOT utilize a PA for historic preservation review have you otherwise complied with National Historic Preservation Act requirements for those activities?
☐ Yes ☒ No ☐ N/A

1e. Total number of activities being funded in whole or in part with DOE funds:

 **Save** Go Back

Document Library

The screenshot shows a web application interface for a Document Library. At the top is a dark blue navigation bar with links: Home, Contact Us, My Profile, Help, Training Videos, Reference Library, FAQs, Submit Success Story, and Logout. Below this is a light gray header section containing a 'Grant Search' input field, 'Grant #: EE0007484', 'Grantee: State of New Hampshire', and 'Status: Active'. The main content area is titled 'Document Library' and features an 'Upload New Document' button (highlighted with a red box). Below the button, it states '0 documents' and includes a 'Filter by' dropdown. A table header shows 'File' and 'Date Uploaded', with the message 'No Records found' below it. On the left side, there is a vertical menu with various categories. 'Grant Administration' and 'Document Library' are highlighted with red boxes. A green arrow points from the 'Document Library' menu item to the main content area.

Home Contact Us My Profile Help Training Videos Reference Library FAQs Submit Success Story Logout

Home Create New Application Search EECBG SEP

Application Documents Plan Workbook Quarterly Performance Reporting Quarterly Financial Reporting Financial Programs Reporting Semi-Annual Davis Bacon Annual Historic Preservation Reports Data Exports to Excel Grant Administration Contact Management Notification Management Amendments Document Library

Grant Search:

Grant #: EE0007484 Grantee: State of New Hampshire Status: Active

Document Library

Upload New Document

0 documents

Filter by

File	Date Uploaded
No Records found	

Document Library

The screenshot shows a web application interface for uploading documents. On the left is a vertical navigation menu with links: Home, Create New Application, Search, EECBG, SEP, Application Documents, Plan Workbook, Quarterly Performance Reporting, Quarterly Financial Reporting, Financial Programs Reporting, Semi-Annual Davis Bacon, Annual Historic Preservation, Reports, Data Exports to Excel, Grant Administration, Contact Management, Notification Management, Amendments, and Document Library (highlighted in green). The main content area is titled 'Upload New Document' and includes an information note: 'The file size limit is 10,000 KB. If there is a need to upload a larger file please contact the PAGE Hotline.' Below this, there is a 'Document for upload:' section with a 'Browse...' button and the text 'No file selected.'. This is followed by 'Title:' and 'Comment:' text input fields. An 'Attach to:' dropdown menu is set to 'Grant (document library)'. The 'Document Tags:' section contains a grid of checkboxes for 'Application Document', 'Audit Report', 'News Articles', 'Other', 'Pictures', 'Required Reports', and 'Supporting Documentation'. At the bottom right are 'Upload' and 'Close' buttons.

- **Note: File size is limited to 10MB. One or more document tags must be selected to upload any file.**
- **If document title is not self-explanatory, please add a brief note in Comments section.**

Help Module

 U.S. DEPARTMENT OF
ENERGY | Energy Efficiency &
Renewable Energy

Weatherization & Intergovernmental Programs

Performance and Accountability for Grants in Energy (PAGE)

[Home](#) | [Contact Us](#) | [My Profile](#) | **[Help](#)** | [Reference Library](#) | [FAQs](#) | [Submit Success Story](#) | [WAP Communications Portal](#) | [Logout](#)

Home

Create New Application

Search ☐

EECBG ☐

SEP ☐

SEP Special Projects ☐

WAP ☐

WAP Training Center ☐

Weatherization Innovative Pilot ☐

Miscellaneous Grants ☐


Grant Monitoring ☐

Help Desk ☐

Home PAGE

Start by clicking on the correct grant program on the left navigation menu which will direct you to the grant search page. Once your grant has been selected, you will be able to access grant-specific pages simply by selecting a menu item.

If you need assistance, or a quick refresher in using the site, be sure to visit our [Training Video Library](#).

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[Webmaster](#) | [Web Site Policies](#) | [Security & Privacy](#) | [USA.GOV](#) |

[Detected browser: Chrome 75.0](#)

Help Module – SEP Formula and Competitive

The screenshot displays the DOE Help Module interface. The top navigation bar includes links for Contents, Index, Search, Glossary, and Print, along with a search field. The left sidebar contains a hierarchical menu. The 'SEP' folder is highlighted with a red box, and a green arrow points to it. Another green arrow points to the 'SEP Special Projects' folder. The main content area shows the 'State Energy Program' page, which includes a description of the program and a list of related links.

Navigation Menu (Left Sidebar):

- PAGE
- Getting Started
- EECBG
- SEP**
 - Application Documents
 - Select a Grant
 - New Grant Application
 - Revisions to Applications
 - Change Grant #
 - Quarterly Performance Reporting
 - Financial Reporting
 - Financial Programs Reporting
 - Grant Administration
 - Davis Bacon Reporting
 - Historic Preservation
 - Plan Workbook
 - Running Reports
- SEP Special Projects
 - Application Documents
 - Quarterly Performance Reporting
 - Financial Reporting
 - Reports
 - Grant Administration
 - Revisions to Applications
- WAP
- WAP Training Center
- WIPP
- Miscellaneous Grants
- Grant Monitoring
- Contact Us
- Change Password
- Deactivate a User
- Enable Extra Reporting
- Glossary
- Invitations
- Login

State Energy Program

The State Energy Program (SEP) provides grants to states and directs funding to state energy offices from technology programs in DOE's Office of Energy Efficiency and Renewable Energy. States use grants to address their energy priorities and program funding to adopt emerging renewable energy and energy efficiency technologies.

Related Links

- [Application Documents](#)
- [New Grant Application](#)
- [Application Revisions](#)
- [Plan Workbook](#)
- [Quarterly Performance Reporting](#)
- [Financial Reporting](#)
- [Reports](#)
- [Grant Administration](#)

Training Video

**U.S. DEPARTMENT OF ENERGY**

Energy Efficiency & Renewable Energy

Weatherization & Intergovernmental Programs

Performance and Accountability for Grants in Energy (PAGE)

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Home

Create New Application

Search

EECBG

SEP

SEP Special Projects

WAP

WAP Training Center

Weatherization Innovative Pilot

Miscellaneous Grants

Grant Monitoring

Help Desk

Home PAGE

Start by clicking on the correct grant program on the left navigation menu which will direct you to the grant search page. Once your grant has been selected, you will be able to access grant-specific pages simply by selecting a menu item.

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[Detected browser: Chrome 75.0](#)

SEP Training Videos



Performance and Accountability for Grants in Energy (PAGE)



Home
Create New Application
Search <input type="button" value="v"/>
EECBG <input type="button" value="v"/>
SEP <input type="button" value="v"/>
SEP Special Projects <input type="button" value="v"/>
WAP <input type="button" value="v"/>
WAP Training Center <input type="button" value="v"/>
Weatherization Innovative Pilot <input type="button" value="v"/>
Miscellaneous Grants <input type="button" value="v"/>
Grant Monitoring <input type="button" value="v"/>
Help Desk <input type="button" value="v"/>

Training Videos

[General System Videos](#)
[Energy Efficiency and Conservation Block Grant \(EECBG\) Program](#)
[State Energy Program \(SEP\)](#)
[Weatherization Assistance Program \(WAP\)](#)
[Webinars](#)

General System Videos

[Navigating the PAGE Site](#)

An overview of the PAGE site, including navigation and site features.

[My Profile](#)

How to change your password, security question, and edit your profile.

[Sending Invitations](#)

How to invite a colleague to create a PAGE user account

[Running Reports](#)

Shows how to run reports to view, print, and save

[User Management](#)

An overview of the user management function, including managing user roles and access rights

Requesting technical assistance

Project Officer

Contact your PO for TA



Robert Hu

Robert.Hu@ee.doe.gov



PAGE Hotline

Page-Hotline@ee.doe.gov

Questions?

Introduction to SEP

A State's Perspective

ELIZABETH M. GRIMES

AUGUST 13, 2019



Have tools in place to help with...

- Drafting and submitting annual application in PAGE
- Collecting subrecipient reports
- Collecting data from State Energy Office staff
- Reporting data collected in PAGE

Suggestion:

Excel spreadsheet that mirrors PAGE application submittal

- Differentiates federal and matching funds
- Calculates salaries, fringe, and indirect

Budget Justification File

FY20 Formula

Funding Source	Identifier	Estimated Unobligated Funds		New or Revised Budget		
		Federal	Non-Federal	Federal	Non-Federal	Total
DOE	1SEP20 ADMIN			\$795,150	\$0	\$795,150
SUBGRANTEE MATCH	1SEP20 CONTRACTS			\$0	\$105,000	\$105,000
STATE MATCH	1SEP20 STATE			\$0	\$182,689	\$182,689
Totals		\$0	\$0	\$795,150	\$287,689	\$1,082,839

20% Req. Match: \$159,030

\$287,689

Object Class Categories	DOE	PVE	SUB MATCH	STATE	PROGRAM INCOME	TOTAL
Personnel	\$191,718	\$0	\$0	\$126,799.74		\$318,518
Fringe Benefits	\$78,197	\$0	\$0	\$48,744.82		\$126,942
Travel	\$16,430	\$0	\$0	\$0.00		\$16,430
Equipment	\$0	\$0	\$0	\$0.00		\$0
Supplies	\$38,306	\$0	\$0	\$0.00		\$38,306
Contractual	\$420,000	\$0	\$105,000	\$0.00		\$525,000
Construction	\$0	\$0	\$0	\$0.00		\$0
Other	\$19,402	\$0	\$0	\$0.00		\$19,402
Total Direct Charges (sum of 6a-6j)	\$764,052.68	\$0	\$105,000	\$175,544.56		\$1,044,597.24
Indirect Charges	\$31,097	\$0	\$0	\$7,144.66		\$38,241.61
Totals (sum of 6i-6j)	\$795,150	\$0	\$105,000	\$182,689.23	\$0.00	\$1,082,838.00

- Breakdown of every budget category
- Descriptions, cost, and justification of need are required for Budget Justification in PAGE
- Totals auto-populate into the budget categories to ensure totals are the same everywhere (424-A and Budget Justification)

Budget Justification File		FY20 Formula	
OTHER DIRECT COSTS			
<u>Basis cost estimates</u>			
Cost estimates are based on similar purchases, catalog prices and/or vendor quotes. The Energy Division observes the State of Alabama Competitive Bid Law. The ADECA			
General Description	Cost	Justification of Need	
Membership Dues	4,551.68	To remain informed and to maintain current knowledge of energy-related issues; dues consist of \$4,551.68 to NASEO	
Data processing services	\$4,000	Computer and office equipment maintenance and technical support, web site services; total is determined by previous year totals. Charges consist of service calls, hardware installation, and website updates	
Printing and graphic services	\$2,000	Mass printing and copying services; graphic arts services, charges are based on previous year totals. Charges consist of media printing and development by our Information Services	
Interoperability and communication devices	\$2,500.00	Includes monthly charges for our mobile handheld devices. These devices are used by our program managers to communicate via electronic mail and voice while on leave, out of office SEP related endeavors, and while attending SEP related events. The program managers who possess the devices are paid by SEP funds and their duties are SEP related.	
Subscriptions related to energy efficiency and renewable energy	\$600.00	To remain informed and to maintain current knowledge of energy-related issues. This is determined by previous year expenses to subscribe to magazines, specialized printed media relating to energy efficiency across the US, and other current events media relating to the State Energy Program.	
FY20 Formula			
CONTRACTS & SUBGRANTS			
NAME OF PROPOSED SUBRECIPIENT/PROGRAM	DOE	Match	EXXON-PVE
ENERGY CODES TRAINING (TBD)	\$ 25,000.00	\$ 6,250.00	\$ - Competitive Request
ENERGY-EFFICIENT RETROFITS (TBD)	\$ 350,000.00	\$ 87,500.00	\$ - Competitive Request
ENERGY-EFFICIENCY AND RESILIENCY FOR LOW INCOME (TBD)	\$ 10,000.00	\$ 2,500.00	\$ - Competitive Request
ENERGY EDUCATION (TBD)	\$ 35,000.00	\$ 8,750.00	\$ - Competitive Request
<hr/> <div style="text-align: right;"> TOTAL: \$ 420,000.00 \$ 105,000.00 \$ - </div>			

Suggestion:

Reporting templates for PAGE reporting

- Gathers all necessary info from both Subrecipients and Program Managers
- Data collected each quarter of the fiscal year

U.S. Department of Energy – SEP Program Status Report
Grant Number: 1SEP19 DOE 20
Report Period: 10/01/2018 - 9/30/2019

Subrecipient City (Retrofits of Local Governments and Non-Profit Organizations)

Market Title: _____ 2. State: Alabama 3. PY: 2018

Status: ☒ Active ☐ Completed ☐ Dropped % of Work Complete: 0%

Outlays by quarter	Planned	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	Total to Date
Source		Q1	Q2	Q3	Q4	
SEP grant (all sources)		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
DOE	\$15,000.00					\$0.00
Subrecipient Match	\$3,750.00					\$0.00

Activity milestone status*		Planned (number)	Completed				%
MILESTONE			10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	
			Q1	Q2	Q3	Q4	
1	Install energy-efficient lights in City Hall	80					0%
2	Implement the ENERGY STAR Portfolio Manager in the building(s) retrofitted under this Award	1					0%
3	Receive SEP Subrecipient training from the Energy Division	1					0%
4	Prepare and submit Invoice(s)	1					0%
5	Prepare and submit Quarterly Program Status Reports (PSRs)	4					0%
6	Prepare and submit a final narrative report	1					0%

Narrative portion
matches info reported
in PAGE

Period 1: 10/1 - 12/31
10. Remarks (problems, issues, variance from plan)*
11. Accomplishments, publicity, good news*
12. Performance outcome data collected*
Period 2: 1/1 - 3/31
10. Remarks (problems, issues, variance from plan)*
11. Accomplishments, publicity, good news*
12. Performance outcome data collected*

Spreadsheets are also useful for...

- Grant tracking and management
- NEPA log
- Historic preservation reporting
- Tracking and reporting expenditures
- Energy savings and metrics information for administrative reports

Other helpful info...

- Know your Special Terms and Conditions
- Refer to SEP Operations Manual
- Sign up for NASEO and DOE emails, listen in on relevant webinars and calls
- Learn the federal and state regulations; state regulations can be more stringent



Be prepared for problems

- Problems will happen
 - Changes in funding
 - Issues with subrecipients
 - Input/questions from elected officials
 - Change in administration
- Be flexible and aware of deadlines

Contact Information

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