

**STATE ENERGY PROGRAM
ANNUAL FORMULA GRANT SUMMARY TEMPLATE**

PY2017

This EERE template is provided for your convenience. Although the use of this template is not required, the data elements within the template are.

Please keep answers concise yet complete. There is no page requirement.

Note this template was updated January, 2017.

Please see below for an example Annual Summary.

Please complete the following sections:

SECTION 1:

STATE:
STATE ENERGY ORGANIZATION:
GRANT NUMBER:

SECTION 2:

TOTAL GRANT AMOUNT FOR PY17: Please provide both the grant amount and the state match.
TOTAL ROLLOVER GRANT FUNDS FOR PY17: If applicable, please provide the amount of funds from previous grant years that you will be using during this program year.
TOTAL LEVERAGED FUNDS AMOUNT FOR PY17: If applicable.
DESCRIPTION OF UNSPENT FUNDS: If applicable.

SECTION 3:

FILL OUT THE BELOW TEMPLATE FOR EACH ACTIVITY THAT HAD A HIGH-IMPACT OR EXCEPTIONALLY INNOVATIVE ACCOMPLISHMENT*
<small>These activities should have quantifiable energy savings. Examples include transportation, retrofits, audit programs (that resulted in energy savings), financial assistance programs, etc.</small>
MARKET TITLE:
ACTIVITY:
GRANT FUNDS USED: Please note amount used for the above activity.
LEVERAGED FUNDS USED: If applicable, please note the amount used and funding source for the above activity.

Attachment 4 – Annual Summary Template

DESCRIPTION OF ACTIVITY ACCOMPLISHMENT(S): Please describe the high-impact or exceptionally innovative accomplishment(s) from the activity listed above. Only note those accomplishments associated with PY17.

ASSOCIATED QUANTITATIVE AND/OR QUALITATIVE ENERGY SAVINGS METRICS (IF AVAILABLE): Please summarize the resulting energy savings metrics from the activity listed above. Only note those energy savings associated with PY17.

SIGNIFICANT BARRIER AND SOLUTION TO ACTIVITY: If applicable, please describe instances where a significant barrier was identified and the solution used to overcome the barrier.

LESSONS LEARNED: Please note any lessons learned from completing this activity.

*Re-use this section of the template for each high-impact or exceptionally innovative activity.

SECTION 4:

FILL OUT THE BELOW TEMPLATE FOR EACH SIGNIFICANT LEGISLATIVE ACTION/POLICY IMPLEMENTATION ATTRIBUTED TO FORMULA FUNDS**

These policies and legislative actions should result in energy savings. Examples include updates to energy codes, creation of energy related orders/bills/laws, creation of state goals/energy strategies, etc.

MARKET TITLE:

GRANT FUNDS USED: Please note the amount used to help enact the legislative action or policy described below and, if possible, what the funds were used for.

LEVERAGED FUNDS USED: If applicable, please note the amount used to help enact the legislative action or policy described below, source of funding, and, if possible, what the funds were used for.

DESCRIPTION OF LEGISLATIVE ACTION OR POLICY: Please describe the legislative action or policy enacted due, at least in part, to formula funds. Please be specific on the role the formula funds played in implementation.

IMPACT OF LEGISLATIVE ACTION OR POLICY: If available, please describe the impact of the legislative action or policy enacted.

**Re-use this section of the template for each legislative action or policy implementation.

SECTION 5:

RECOMMENDATION TO THE FORMULA GRANT PROCESS: Please share any recommendations you have for DOE to improve the formula grant process or ways to improve SEP as a whole.

OTHER COMMENTS: Please provide any additional comments or feedback.

Example Annual Summary

**STATE ENERGY PROGRAM
ANNUAL FORMULA GRANT SUMMARY
PY2017**

SECTION 1:

STATE: Wonderland

STATE ENERGY ORGANIZATION: Wonderland Energy Office (WEO)

GRANT NUMBER: EE000000

SECTION 2:

TOTAL GRANT AMOUNT FOR PY17: \$300,000 grant + \$30,000 state match = \$330,000

TOTAL ROLLOVER GRANT FUNDS FOR PY17: None

TOTAL LEVERAGED FUNDS AMOUNT PY17: \$500,000

DESCRIPTION OF UNSPENT FUNDS: All funds were spent.

SECTION 3:

HIGH-IMPACT OR EXCEPTIONALLY INNOVATIVE ACCOMPLISHMENT

MARKET TITLE: Buildings

ACTIVITY: Residential Retrofit Program

GRANT FUNDS USED: \$10,000

LEVERAGED FUNDS USED: \$5,000 from EXXON PVE funds.

DESCRIPTION OF ACTIVITY ACCOMPLISHMENT(S): Contracted with RetroCompany to perform audits and retrofits on 33 residential homes. EE modifications included shell improvements, switch to high efficiency lightbulbs, HVAC updates, and more efficient water heating systems.

ASSOCIATED QUANTITATIVE AND/OR QUALITATIVE ENERGY SAVINGS METRICS (IF AVAILABLE): Program retrofitted 79,200 square feet. It is estimated that these retrofits will save 20%, or 2,162 kWh per home annually. Savings from PY2017 are 71,346 kWh (33 homes X 2,162 savings).

SIGNIFICANT BARRIER AND SOLUTION TO ACTIVITY: Barrier: RetroCompany was asking to charge amounts above what could be provided. Solution: WEO was able to negotiate a price, but couldn't provide retrofits to as many homes as it originally had wanted.

LESSONS LEARNED: Make sure to ask for a price estimate before setting goals, and be sure to shop around to get the best price.

SECTION 3:

HIGH-IMPACT OR EXCEPTIONALLY INNOVATIVE ACCOMPLISHMENT
<p>MARKET TITLE: Transportation</p> <p>ACTIVITY: EV Station Installation</p> <p>GRANT FUNDS USED: \$50,000</p> <p>LEVERAGED FUNDS USED: None</p> <p>DESCRIPTION OF ACTIVITY ACCOMPLISHMENT/S: Installed 35 EV charging stations along highway 55. Each charging station records number of times used and length of charge.</p> <p>ASSOCIATED QUANTITATIVE AND/OR QUALITATIVE ENERGY SAVINGS METRICS (IF AVAILABLE): Each station has, on average, shown 62 charges during PY17 operation (August 2017-June 2018). The average charging time was recorded at 43 minutes, with an average of 3 kWh used per charge. In total, these stations have used 6,510 kWh and have saved 868 gallons of gasoline.</p> <p>SIGNIFICANT BARRIER AND SOLUTION TO ACTIVITY: Barrier: Disagreement over where the stations should be located. Solution: WEO released a survey for EV owners to vote on locations.</p> <p>LESSONS LEARNED: Be aware that some charging stations are not compatible with all EVs.</p>

SECTION 4:

SIGNIFICANT LEGISLATIVE ACTION/POLICY IMPLEMENTATION
<p>MARKET TITLE: State Energy Policy</p> <p>GRANT FUNDS USED: \$15,000 spent on staff time (approximate hours X salaries).</p> <p>LEVERAGED FUNDS USED: Not Applicable</p> <p>DESCRIPTION OF LEGISLATIVE ACTION OR POLICY: WEO developed and released a 10-year energy strategy of which requires a 20% reduction in state building energy use by 2027. Funds paid for WEO staff time to develop and release the plan.</p> <p>IMPACT OF LEGISLATIVE ACTION OR POLICY: Once complete, a 20% reduction is estimated to save 50.8 kBtu/sq.ft. annually (from a baseline of 204 kBtu/sq.ft. to a goal of 163.2 kBtu/sq.ft.).</p>

SECTION 5:

<p>RECOMMENDATION TO THE FORMULA GRANT PROCESS: None at this time.</p> <p>OTHER COMMENTS: None at this time.</p>
