**STATE ENERGY PROGRAM**

**ANNUAL FORMULA GRANT SUMMARY TEMPLATE**

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 February 21, 2019.

*Please see below for an example Annual Summary.*

**Please complete the following sections:**

**SECTION 1:**

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| **STATE:** **STATE ENERGY ORGANIZATION:** **GRANT NUMBER:**  |

**SECTION 2:**

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| **TOTAL GRANT AMOUNT FOR PY19:** Please provide both the grant amount and the state match. **TOTAL ROLLOVER GRANT FUNDS FOR PY19:** 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 PY19:** If applicable. **DESCRIPTION OF UNSPENT FUNDS:** If applicable.  |

**SECTION 3:**

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| FILL OUT THE BELOW TEMPLATE FOR **EACH** ACTIVITY THAT HAD A HIGH-IMPACT OR EXCEPTIONALLY INNOVATIVE ACCOMPLISHMENT\*These activities should have quantifiable energy savings. Examples include transportation, retrofits, audit programs (that resulted in energy savings), financial assistance programs, etc.  |
| **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. **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 PY19. **ASSOCIATED QUANTIATIVE 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 PY19.**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:**

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| FILL OUT THE BELOW TEMPLATE FOR **EACH** SIGNIFICANT LEGISLATIVE ACTION/POLICY IMPLIMENTATION 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 LEGISILATIVE 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 significant legislative action or policy implementation.  |

**SECTION 5:**

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| FILL OUT THE BELOW TEMPLATE FOR **EACH** SIGNIFICANT CONTRIBUTION TO EMERGENCY OR RESILIENCY PLANNING AND IMPLIMENTATION ATTRIBUTED TO FORMULA FUNDS\*Examples include updates to emergency plans, use of funds during a natural disaster, energy assurance exercises, etc. |
| **MARKET TITLE:** **GRANT FUNDS USED:** Please note the amount of SEP formula funds that were utilized for emergency or resilience planning and implementation. **LEVERAGED FUNDS USED:** If applicable, please note the amount of leveraged funds used for emergency or resilience planning and implementation. **DESCRIPTION OF CONTRIBUTION TO EMERGENCY OR RESILLIENCY PLANNING:** Please describe the improvements or use of emergency or resilience planning and implementation due, at least in part, to formula funds. **IMPACT OF CONTRIBUTION TO EMERGENCY OR RESILLIENCY PLANNING:** If available, please describe the impact of the emergency or resilience planning and implementation. \*Re-use this section of the template for each significant contribution.  |

**SECTION 6:**

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| **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**

**PY2019**

**SECTION 1:**

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| **STATE:** Wonderland**STATE ENERGY ORGANIZATION:** Wonderland Energy Office (WEO)**GRANT NUMBER:** EE000000 |

**SECTION 2:**

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| **TOTAL GRANT AMOUNT FOR PY19:** $300,000 grant + $30,000 state match = $330,000**TOTAL ROLLOVER GRANT FUNDS FOR PY19:** None**TOTAL LEVERAGED FUNDS AMOUNT PY19:** $500,000**DESCRIPTION OF UNSPENT FUNDS:** All funds were spent.  |

**SECTION 3:**

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| 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 QUANTIATIVE 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:**

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| HIGH-IMPACT OR EXCEPTIONALLY INNOVATIVE ACCOMPLISHMENT |
| **MARKET TITLE:** Transportation**ACTIVITY:** EV Station Installation **GRANT FUNDS USED:** $50,000**LEVERAGED FUNDS USED:** None**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.**ASSOCIATED QUANTIATIVE AND/OR QUALITATIVE ENERGY SAVINGS METRICS (IF AVAILABLE):** Each station has, on average, shown 62 charges during PY19 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. **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.**LESSONS LEARNED:** Be aware that some charging stations are not compatible with all EVs. |

**SECTION 4:**

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| SIGNIFICANT LEGISLATIVE ACTION/POLICY IMPLIMENTAION  |
| **MARKET TITLE:** State Energy Policy**GRANT FUNDS USED:** $15,000 spent on staff time (approximate hours X salaries).**LEVERAGED FUNDS USED:** Not Applicable**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.**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.).  |

**SECTION 5:**

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| SIGNIFICANT CONTRIBUTION TO EMERGENCY OR RESILIENCY PLANNING AND IMPLIMENTATION  |
| **MARKET TITLE:** Emergency Planning **GRANT FUNDS USED:** $15,000 **LEVERAGED FUNDS USED:** $10,000 from Bright Electricity Company **DESCRIPTION OF CONTRIBUTION TO EMERGENCY OR RESILLIENCY PLANNING:** Updated the State’s energy emergency assurance plan and conducted a table top exercise with related heating, oil, propane, gasoline, diesel fuel, natural gas, and electricity associations, several state agencies (including the governor), local businesses, and the US Coast Guard. **IMPACT OF CONTRIBUTION TO EMERGENCY OR RESILLIENCY PLANNING:** The table top exercise encountered a few road blocks that have been ironed out and should not occur in the case of an actual emergency. For example, the petroleum offloading facility at Rocky Road Point did not have the local emergency response contact information. |

**SECTION 6:**

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| **RECOMMENDATION TO THE FORMULA GRANT PROCESS:** None at this time.**OTHER COMMENTS:** None at this time.  |