INSTRUCTIONS OVERVIEW:

The Excel workbook named "Annual Program Metrics and Impact Report.xlsx" serves as the annual performance report template for recipients of the 40101d grant program. As a grant recipient, you will populate this template once a year at the end of each Federal Fiscal Year **throughout the duration of the award agreement for all projects.** The report should be submitted via the Energy Efficiency and Renewable Energy Project Management Center Portal (EERE-PMC Portal). Please see your Assistance Agreement for more information regarding this process.

Various worksheets are contained within this workbook, wherein a worksheet is portrayed as a tab along the bottom of the workbook.

- Ten "Project" worksheets are provided as templates. They are to be completed for ***each*** resilience project subawarded by the recipient. **Completion of at least one "Project" subawardee worksheet is required by the end of the grant performance period.** Additional worksheets can be added (if you have subawarded more than 10 resilience projects) by completing the following:
  - Right-click on a project template worksheet (e.g., "Project 1")
  - Select Move or Copy
  - Select Project 1 from the list and check 'Create a Copy'
  - Select OK
  - Rename the newly copied worksheet (e.g., "Project 6") by right-clicking on the worksheet name and selecting "Rename"

Be sure to update Row 2 (Project ID Number) to match the name for any newly created project worksheet(s). *Please delete any unused project worksheet tabs prior to submission.* ***Please make sure the project number aligns with the project numbers listed in the Quarterly Progress Report (e.g., GDXXX-001).***

Each State/Indian Tribe (i.e., recipient) is responsible for ensuring that all necessary project information is populated within this document, and that the information denoted is accurate. Contact your DOE Federal Project Officer (FPO) if you have questions while preparing this report. The **DOE FPO (also called the Program Manager**) is identified in Block 15 of the Assistance Agreement of your grant.

This document contains drop-down menus and unchanging elements. Unique identifiers are described below.

- Yellow Fill: Selection(s) from a drop-down menu are required in yellow-colored cells. Do not modify the list of drop-down menu selections or delete the drop-down to enter general text. Only selections from the provided list should be used where noted. Review the list of responses provided in each drop-down menu and select the answer that best matches your desired response.
- Orange Fill: Information in orange-colored cells should remain static after initial entry. The information provided in these fields should not change each year.

The Federal Fiscal Year (FY) calendar should be used to prepare this report. The FY calendar ends on September 30th of the following calendar year.

Each Annual Program Metrics and Impact Report is due within 90 days of each Fiscal Year end date, which is December 30th of each year.

DETAILED INSTRUCTIONS:

Note: The color-coded sections below correlate with the color-coded tables contained in the annual reporting spreadsheet.

General Information

On the **"Recipient"** worksheet:

- **Federal Fiscal Year Reporting Period**: Select the appropriate year from drop-down menu provided.
- **DOE Grant Agreement Number**: Agreement number assigned to you; found on your Assistance Agreement (e.g., DE-GD0000001).

On each **'Project'** worksheet:

- **Project ID Number**: Should match worksheet name you are populating and match the project ID numbers used in the Quarterly Progress Report.
- **Project Organization or Subawardee**: Name of subawardee performing the project work.
- **Project Title**: Descriptive name of project work being done.
- **Project Performance Period Start Date**: Start date of project work; remains static.
- **Project Performance Period End Date**: Project end date; estimated initially and may be updated throughout project lifecycle.
- **Project Status**: Drop-down menu of project milestones identified in the Quarterly Progress Report.

Technical Assistance

This metric tracks the type of technical assistance funded by the recipient as it pertains to any of the projects funded. The table is designed to collect information both on the organization funded to provide technical assistance, and the communities receiving that technical assistance. Please complete one row per organization and provide each instance of assistance. *Example: If ABC Corporation is providing Policy and Planning, Financial Analysis, and Capacity Building assistance there should be three rows reflecting each type of assistance from the one organization.*

On the **'Recipient'** worksheet:

- **Organization Name**: Input the name of the organization providing technical assistance for this reporting period ONLY.
- **Technical Assistance Category**: Select the category of technical assistance provided by the organization. Definitions of technical assistance can be found on the "Definitions" tab at the end.
- **Technical Assistance Deliverable**: Select the category of deliverable provided in the drop-down list. If another deliverable, please specify in the "Other" field.
- **Communities of Interest Served**: Identify which, if any, communities of interest received technical assistance. Some organizations may represent more than one community type, select all that apply or leave blank if none apply. Definitions for Communities of Interest can be found on the "Definitions" tab.

Impact Metrics

These metrics are designed to track performance of the funded resilience projects. The first table should be populated with baseline metric information going back five years before the project start year (i.e., the five years preceding the current fiscal year report). These baseline metrics will not change over the course of the project. The second table should be populated with impact metrics for the current fiscal year of the project(s).

The "Table of Metrics" tab also lists out these impact metrics for reference when reporting. Please do NOT edit or modify information within this tab. If you need to use a different metric, please select "Other" and report it as described below.

On each **'Project'** worksheet:

- **Impact Metric (dropdown)**: Using the provided drop-down menu, select applicable impact metrics that apply to the project.
- **Outage Type (dropdown)**: If applicable, select the outage type that each impact metric is associated with. For example, if the impact metric is “number of customers interrupted” then outage type would specify the cause of all those outages, such as “wildfire.”
- **Does outage data include Major Event Days (MED)? (dropdown)**: Using the provided drop-down menu, select whether the metric provided considers MEDs. A MED is defined in IEEE 1366-2001 2.5 Beta Methodology which can be found here. If subawardee does not use this definition, report alternate definition in "Metric Type" field.
- **Coverage (dropdown)**: Specifies which part of the electric grid the impact metric is associated with.
- **Metric Type (free form)**: If using an impact metric not specified in the drop-down menu, add it here using less than 300 characters; can remain blank if not applicable.
- **Outage Type (free form)**: If using an outage type not specified in drop-down, add it here using less than 100 characters; can remain blank if not applicable.
- **Coverage Type (free form)**: If specifying an area of the system not available in the drop-down menu, add it here using less than 100 characters; can remain blank if not applicable.
- **Values:** Enter the numeric metric value for the associated Fiscal Year.
- **Start Date of Data Collection**: Use date format mm/dd/yyyy.
- **End Date of Data Collection**: Use date format mm/dd/yyyy.