Energy Efficiency & Conservation Block Grant

Small Business
Non-Profit
Healthcare
Higher Education

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Indiana Office of Energy Development

updated June 2010

Contract Process

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Contract Process

1

- You're awarded a grant

2

- Contract will be prepared

3

- You will receive the following documents:
  - Contract
  - Authorized Signatures for Payment Request form
  - Vendor Information form

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Contract Process

4

- Sign the contract & each form
- **Must** be original signatures!

5

- Return contract & all forms in their entirety

6

- Contract will enter state's signature process

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Contract Process

7

- Contract is executed in approximately 4-8 weeks

8

- OED will provide you with a copy of your executed contract & claim voucher

9

- Draw downs can then occur

10

- Must draw down & complete project by Dec. 31, 2010

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Draw downs

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Steps to draw down:

Contract is executed & recipient receives claim voucher

Recipient makes a copy of the claim voucher form & fills in as instructed

(Signature should match the signature on the Authorized Signature form!)

Recipient returns claim voucher to OED with supporting, specific invoices marked paid or showing zero balance

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Steps to draw down:

OED approves claim voucher & invoices (1-2 days)

OED sends documentation to State Auditor's Office for payment (at least 10 days)

Recipient must draw down all funds by December 31, 2010

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Davis-Bacon Act

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Davis-Bacon Implementation

Office of Energy Development

Will contract with DBA Monitor

DBA Monitor

Will serve as the go-between, collecting payroll, verifying compliance, & resolving issues

Recipient

Will ultimately be responsible for compliance: collecting payroll from contractors, performing site visits, etc.

Recipient's Contractor

Will submit certified payroll records each week.

Davis-Bacon Implementation

- You MUST have attended one of the Davis-Bacon orientation meetings before proceeding
- Didn't attend? Watch webinar online via OED's website at http://oed.in.gov/
- DBA questions not covered in meeting or in webinar?
  - Questions.OED@crowehorwath.com
  - 317-269-6687

Reporting

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One-Time ARRA Report

Reporting Components:

- DUNS number
- Congressional District(s)
- Sub-award number (your grant number)
- Sub-award date (date your contract was executed)
- Sub-award amount
- Place of performance
- Address, including last 4 digits of zip code

An account will be set up for you at http://oed.arra.in.gov/

Quarterly ARRA Reports

Quarterly ARRA Reporting Schedule	
Months	Report due
January – March	April 3rd
April – June	July 3rd
July – September	October 3rd
October – December	January 3rd

An account will be set up for you at http://oed.arra.in.gov/

Reports are published on recovery.gov at the end of the reporting month.

Quarterly ARRA Reports

Reporting Components:

- Sub-award number (grant number)
- Funds received (what you actually have in hand)
- Hours
- Number of jobs
- Description of jobs created
- Vendor information

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Monthly Reports

Monthly Reporting Schedule				
Month	Report Due		Month	Report Due
January	February 15th		July	August 15th
February	March 15th		August	September 15th
March	April 15th		September	October 15th
April	May 15th		October	November 15th
May	June 15th		November	December 15th
June	July 15th		December	January 15th

- Must use OED's online grant portal
- Use same login information you used to apply
- Reminders will be automatically generated for you each month

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Monthly Reports

Key Reporting Components:

- **Using both ARRA & other funds**
  - Jobs created/retained
  - Energy audits performed
  - Dollars spent
- **In general**
  - Building retrofits
    - # of retrofits
    - Square footage
  - Energy savings
  - Energy cost savings
  - CO_2 reduced

First report due July 2010
(covers June)

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Quarterly Reports

Quarterly Reporting Schedule	
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- Must use OED's online grant portal
- Use same login information you used to apply
- Reminders will be automatically generated for you each month

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Quarterly Reports

Key Reporting Components:

- Jobs created/retained
- Energy savings
- Energy cost savings
- Greenhouse gases reduced
- Buildings retrofitted

Energy Savings

step ONE

Visit Portfolio Manager to set up an account:

https://www.energystar.gov/istar/pmpam/

step TWO

Visit the Portfolio Manager Benchmarking Starter Kit for additional instructions:

http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_benchmarking

- Using Portfolio Manager will be a requirement in your contract
- Portfolio Manager will help you track your energy usage, savings, & cost savings – all measures of which you will report
- System will perform weather normalization

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Jobs

Job Created = Job Retained

How to calculate:

Number of hours work was performed during the quarter ÷ Number of hours in a quarter (520) = Full-Time Equivalent (FTE)

Example:

1200 hours ÷ 520 = 2.3 FTE

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Modifications, Site Visits, Giving Credit, & Contacting Us

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Modifications

What's in Exhibit A in the contract?

- Scope of Services
- Budget

What if I need to change the project/Exhibit A?

You <u>must</u> seek out & receive OED's approval first!

What happens if change the project & didn't receive OED's approval first?

Making <u>any</u> changes without OED's approval <u>will</u> jeopardize your grant funding!

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Site Visits

- **One site visit per recipient at a minimum**
- **An additional site visit if recipient is:**
  - Not in compliance with any part of contract
  - Late reporting two consecutive times (monthly and/or quarterly)
- **What to expect:**
  - Sit down meeting discussing the grant and its administration
  - Tour of the project

Credit

- Must give the Indiana Office of Energy Development & the U.S. Department of Energy recognition in any press releases, marketing or educational information, and on any signage

- Must display OED's logo and link to OED's website on your organization's website
- Must provide ARRA logo on website as well
  - OED will provide these logos for your use

Contact Us

Contracts, Reporting, & Davis-Bacon	Molly Whitehead	mwhitehead@oed.in.gov	317-233-0541
Contracts & Draw downs	Carmen Pippenger	capippenger@oed.in.gov	317-232-8951
EECBG Program	John Deahl	jdeahl@oed.in.gov	317-232-8978

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