

Onboarding Webinar

Energy Innovation Grant Program (EIGP)

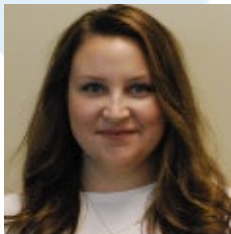
Rural Energy Start-Up Program (RESP)

**Thursday, June 13, 2024
10 a.m.**



Office of Energy Innovation

OEI Staff: Who you will be working with – contact at OEI@wisconsin.gov



Olivia Shanahan
State Energy Office Supervisor



Gina Steward
Grants and Compliance Lead, EIGP Case Coordinator



Nicholas Labinski
Stakeholder Engagement Lead, RESP Case Coordinator



Heidi Marson
EIGP and RESP Energy Project Coordinator



Sam Hermanstorfer
Environmental Coordinator

OEI@Wisconsin.gov



Wisconsin Office of Energy Innovation

Agenda

- ▶ Introduction of Office of Energy Innovation Staff
- ▶ Background on EIGP and RESP
- ▶ Program/Project Timeline Overview
- ▶ Required Accounts
- ▶ What information needs to be submitted BEFORE I receive a Grant Agreement?
- ▶ Infrastructure Investment and Jobs Act (IIJA) Requirements
 - ▶ National Environmental Policy Act (NEPA)
 - ▶ State Historic Preservation Office (SHPO)
 - ▶ Build America/Buy American (BABA)
 - ▶ Davis Bacon Act (DBA)/LCP Tracker – Davis Bacon Reporting
- ▶ Contract Negotiations and Agreements
- ▶ What information is expected from me AFTER I receive a Grant Agreement?
- ▶ Reporting Requirements / Payment Requests
- ▶ Questions?

EIGP Program Background

- ▶ **The Energy Innovation Grant Program (EIGP) 2023** design and budget were established by the Public Service Commission in an open meeting, and the Order was signed and served on November 29, 2023
 - ▶ Federally Funded through U. S. Department of Energy by the 2021 Infrastructure Investment and Jobs Act (IIJA) also known as the Bipartisan Infrastructure Law (BIL)
- ▶ **EIGP 2023 was the 5th round of funding: 86 applicants, 28 projects selected, \$7.8 million in grant funding**
 - ▶ **Activity 1: Renewable Energy and Energy Storage – Approximately \$3.4 Million**
 - ▶ **Activity 2: Energy Efficiency and Demand Response – Approximately \$3.4 million**
 - ▶ **Activity 3: Comprehensive Energy Planning & Feasibility Studies for Microgrids – \$1 million**

RESP Program Background

- ▶ **The Rural Energy Start-Up Program (RESP)** design and budget were established by the Public Service Commission in an open meeting, and the Order was signed and served on November 29, 2023
 - ▶ Federally Funded through U. S. Department of Energy by the 2021 Infrastructure Investment and Jobs Act (IIJA) also known as the Bipartisan Infrastructure Law (BIL)
- ▶ **RESP inaugural rounding of funding: 30 applicants, 29 projects selected, \$2.3 million in grant funding**
 - ▶ **Activity 1: Comprehensive Energy Planning**
 - ▶ **Activity 2: Renewable Resource Planning**
 - ▶ **Activity 3: Energy Audits and Building Implementations**

RESP Program Background

▶ RESP Activity Blueprints include:

- ▶ **Activity 1:** [Blueprint 1: Energy Planning | Department of Energy](#) Energy Planning Blueprint includes a high-level overview of the process and benefits of energy planning, showcases important tools and online resources, and outlines Key Activities to help guide EECBG Program entities to success. A Key Activities Summary PDF is also available for download, which provides a concise summary of the Blueprint Key Activities. A How-to-Guide is also available for download to provide more granular steps, recommendations, and resources within each key activity.
- ▶ **Activity 2:** [Blueprint 3D: Renewable Resource Planning for Rural and Tribal Communities | Department of Energy](#) Renewable Resource Planning Blueprint includes a high-level overview of the process and benefits of renewable energy planning. It can be useful for all EECBG Program awardees including rural and tribal communities. The Blueprint showcases important tools and online resources and outlines Key Activities to help guide EECBG Program entities to success.
- ▶ **Activity 3:** [Blueprint 2A: Energy Efficiency: Energy Audits, Building Upgrades | Department of Energy](#) Energy Audit and Building Retrofit Blueprint includes a high-level overview of the process and benefits of energy audits and building retrofits, showcases important tools and online resources, and outlines Key Activities to help guide EECBG Program entities to success. A Key Activities Summary PDF is also available for download which provides a concise summary of the Blueprint Key Activities. A How-to-Guide is also available for download to provide more granular steps, recommendations, and resources within each key activity.

EIGP & RESP Timeline

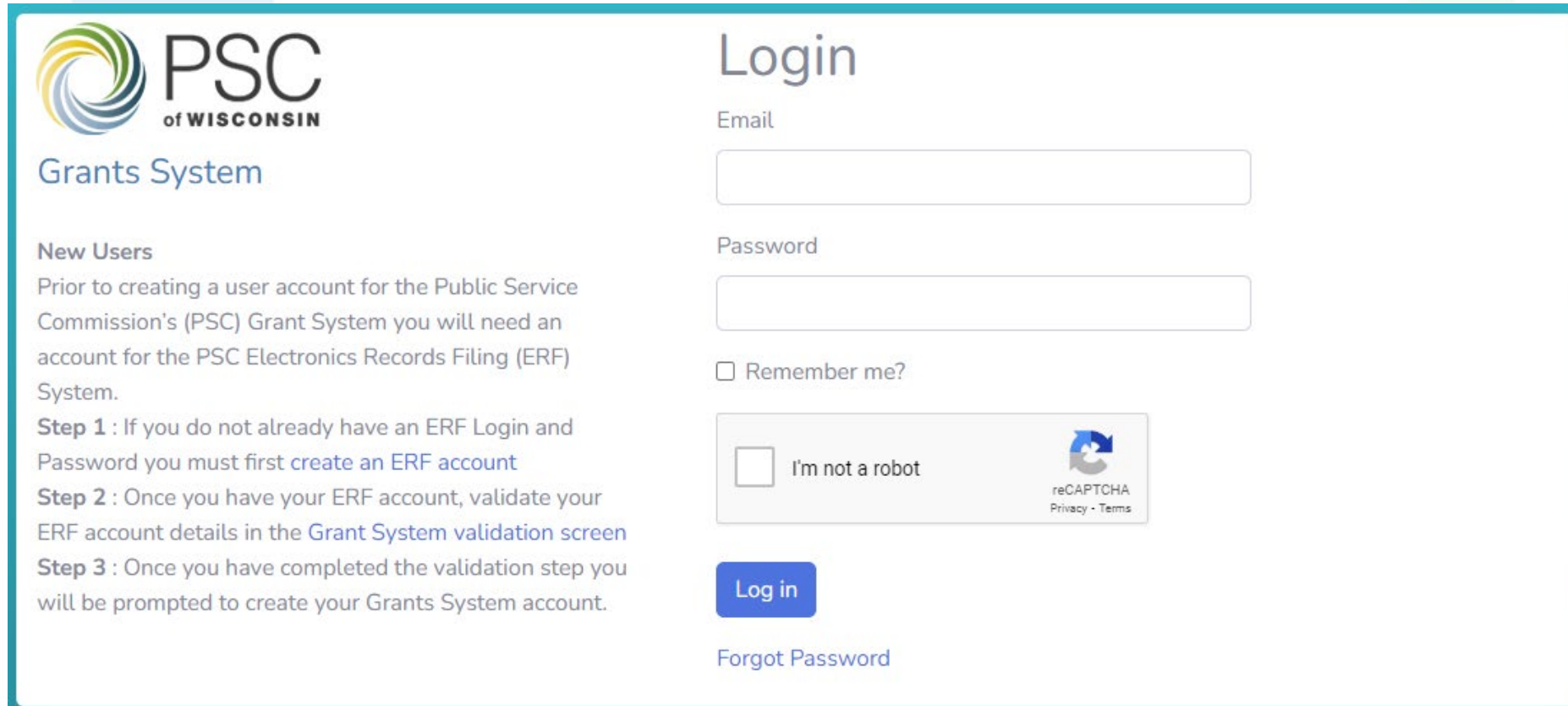
Spring 2024	Commission Awards Grants for EIGP 2023 and RESP
Spring –Summer 2024	Onboarding and Necessary Filings: <ul style="list-style-type: none">• Onboarding information is collected• Federal reviews take place as applicable (e.g. NEPA/SHPO)• Grant Agreement negotiations and execution
Date of Grant Agreement Execution through June 30, 2025	Project performance period
	Quarterly Report submissions: July 15 th , October 15 th , January 15 th , April 15 th , and as applicable
	Davis-Bacon compliance reporting (weekly)
September 2025	Deadline for all final reports and request for reimbursement due


Required Accounts

- ERF (Electronic Records Filing) System.
- PSC Grants System – System used to upload and store documentation related to your project
- UEID (formerly known as DUNS) Number is a unique identifier for recipients of Federal funds
A **Unique Entity ID (UEI)** is a distinct identifier used to track and manage entities, such as organizations or businesses, in various systems. To obtain, renew or reactivate a UEI, visit the official **SAM.gov** website and follow the designated process.
- LCP Tracker / DOE Davis Bacon Program Software (to be reviewed later in webinar)
[BIPARTISAN INFRASTRUCTURE LAW DAVIS BACON ACT COMPLIANCE USING LCP TRACKER \(energy.gov\)](https://www.energy.gov/bipartisan-infrastructure-law-davis-bacon-act-compliance-using-lcp-tracker)
[Email: Support@lcptracker.com](mailto:Support@lcptracker.com)
(see [Getting Set Up](#) in LCPtracker for required information.)

Required Accounts

Documentation related to your project will be submitted using the PSC Grants System, which you used to submit your application:



 **PSC**
of WISCONSIN

Grants System

New Users
Prior to creating a user account for the Public Service Commission's (PSC) Grant System you will need an account for the PSC Electronics Records Filing (ERF) System.

Step 1 : If you do not already have an ERF Login and Password you must first [create an ERF account](#)

Step 2 : Once you have your ERF account, validate your ERF account details in the [Grant System validation screen](#)


Step 3 : Once you have completed the validation step you will be prompted to create your Grants System account.

Login

Email

Password

Remember me?

I'm not a robot 
reCAPTCHA
Privacy - Terms

[Log in](#)

[Forgot Password](#)

Required Accounts


Grant System Home Page: Where you will select the appropriate tab to update, upload, track and review all information related to your grant.


Grant Type: Energy Innovation Grant Program (EIGP) | Grant Name: 2023 Energy Innovation Grant Program (EIGP) | Grant Year: 2023 | Project: Solar PV Consortium

 Project Details

 Contacts

 Budget

 Reimbursements

 Uploads

 Related Documents

 Project Questions

 Project Communities Served

 Contribution Details

 Notes

Status Reports

Grant Project Details

Grant ID *	28
Grant Name	2023 Energy Innovation Grant Program (EIGP)
Docket ID	9709-FG-2023

What information needs to be submitted BEFORE I receive a Grant Agreement?

All Grant Subrecipients will be required to submit:

- 📄 Onboarding Questionnaire (attached to your initial email)
- 📄 Environmental Screening Tool (attached to your initial email)

Upon completion and review of the Environmental Screening Tool, certain Grant Subrecipients will be required to submit:

- 📄 NEPA / EQ 1 forms
 - 📄 EQ1
 - 📄 Scope of Work
 - 📄 Project Layout
- 📄 SHPO related information, if requested from staff

What information needs to be submitted BEFORE I receive a Grant Agreement?

I have submitted my Onboarding Form and my Environmental Screening Tool. Can I begin to incur reimbursable and match related expenses while I wait for my grant agreement?

No



Infrastructure Investment & Jobs Act (IIJA) Requirements

Must be done prior to your project/grant agreement execution

National Environmental Policy Act Review (NEPA)

<https://www.energy.gov/eere/articles/national-environmental-policy-act-and-historic-preservation-training-website>

State Historic Preservation (SHPO)

https://www.energy.gov/sites/prod/files/2014/01/f7/state_historic_preservation_programmatic_agreement_wi.pdf

Tracking and reporting during project performance period

Build America/ Buy America (BABA) Requirements for Infrastructure Projects

<https://www.energy.gov/management/build-america-buy-america>

Davis Bacon and Related Acts

<https://www.dol.gov/agencies/whd/government-contracts/construction/guidance>
[Employment Law Guide - Prevailing Wages in Construction Contracts \(dol.gov\)](#)

Justice 40

<https://www.energy.gov/em/justice40-initiative>



IIJA Requirements: National Environmental Policy Act (NEPA)

All Subrecipients will need to complete and submit to OEI staff an initial environmental screening of their project using the screening tool provided. We may have follow-up questions based on the information provided and type of project.

Certain Subrecipients will be directed to complete and submit, prior to the contract negotiation process, an Environmental Questionnaire (EQ) for NEPA review and approval by the U.S. Department of Energy (DOE). An EQ will be required if the project is beyond the scope of the “Bounded Categories” used by DOE.

*The level of environmental review and documentation depends on the potential significance of the anticipated environmental impacts associated with the proposed action. Most projects are expected to fall into **Categorical Exclusion**.*

IIJA Requirements: NEPA

➤ What is a Categorical Exclusion?

- Categorical exclusions are actions that DOE has determined normally do not have a significant effect on the human environment and therefore, neither an environmental assessment nor an environmental impact statement are normally required.
- DOE has pre-determined Bounded Categories of activities that are categorically excluded from further NEPA review, *absent extraordinary circumstances, cumulative impacts, or connected actions that may lead to significant impacts on the environment, or any inconsistency with “integral elements”*
- Examples of Bounded Category actions include, but are not limited to:
 - Modifications or repair to pumps, piping, and wells
 - Small-scale renewable energy research and development and pilot projects
 - Solar photovoltaic systems (depending on size)
 - Wind turbines (depending on size and/or location)
 - Ground source heat pumps
 - Alternative fuel vehicle fueling stations and electric vehicle charging stations
 - Energy efficiency upgrades: heat pumps, lighting, insulation, interior temperature control systems

(some projects may require additional environmental review for SHPO documentation)

IIJA Requirements: NEPA

What is a Connected Action?

The proposed project is the installation and operation of a **solar photovoltaic (PV) system**

Requires the installation of a **power pole** and a **transformer** to serve the PV system

Includes trenches for underground lines!

The new power pole and transformer **would not exist** if not for the PV system, therefore their construction is considered a "connected action"

DOE's NEPA analysis must **include** an evaluation of the impacts associated with the installation of the power pole and transformer, even if they **are not** included in the scope of work funded by DOE

IIJA Requirements: NEPA

To qualify for a Bounded Category or Categorical Exclusion, a project cannot:



Threaten a violation of environment, safety, and health requirements



Have the potential to cause significant impacts on environmentally sensitive or culturally important resources



Disturb hazardous substances, pollutants, or contaminants

IIJA Requirements: NEPA

Irreversible actions

Irreversible actions are unallowable prior to a final NEPA determination.

Obvious	Not as Obvious
<ul style="list-style-type: none">• Site preparation• Infrastructure/building modifications• Construction/installations	<ul style="list-style-type: none">• Final design• Capital equipment

**Change in Scope?
STOP and UPDATE OEI
STAFF**



IJA Requirements: NEPA

The more information you can provide relating to your project and its anticipated impacts, the less potential for delay. The goal is to document the impacts associated with the project.

What documentation should the Awardee be providing for initial review, prior to the contact/agreement finalization?

❑ Environmental Screening Tool – all Awardees

- Provide a sample layout of the project. As much detail as you can provide is preferable.
- Historic Preservation Information – How old is the structure? Is it located in a historic district or on the historic register?
- Is the property located in a culturally or environmentally sensitive area?
- Are there Tribal considerations?
- Is the project in or near 100-year floodplains or wetlands?

❑ **EQ1 (Environmental Questionnaire), if applicable to your project.** OEI Staff can send you a form or you can find a word version here: https://www.eere-pmc.energy.gov/PMCRRecipient/EQ_Sample.docx

- Fill out the EQ1 form and return it to OEI staff – do not fill out online. (DOE instructions).
- Complete Scope of Work attach to EQ1.

IIJA Requirements: NEPA

Example of Activities that that will most likely require additional environmental review (EQ-1):

- Installation of a solar PV (exceeding 60kW and battery storage system - outside of existing facility boundary)
- Interconnect two existing microgrids (“...categorically excluded from further NEPA review, *absent extraordinary circumstances, cumulative impacts, or connected actions...*”)
- Heat recovery systems

Some Bounded Categories actions may need additional documentation to satisfy State Historic Preservation Office (SHPO) requirements:

- Solar PV less than 60 kW that are ground mounted (disturbance).
- Some types of work on properties greater than 50 years of age. (1974)
- Projects on Tribal properties or lands – DOE will likely do direct outreach.

IJA Requirements: NEPA

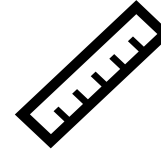
- Complete Scope of Work and answer the following questions:
- Will the proposed project only conduct intellectual, academic, or analytical activities? For example:
 - Feasibility Studies or Comprehensive Planning
 - Data analysis
 - Computer modeling
 - Analytical reviews
 - Conceptual design or planning
 - Literature searches and information gathering
 - Document preparation
- Planned construction/installation schedule
- Location of project activities (include a map showing all work areas)
- **Describe in detail the project construction and/or installation activities**

Quick Tips for Map Organization

Maps are easier to interpret when they have:



Legend



Scale Bar



North Arrow



Landmarks

Free, Publicly Available Map Tools:

- Google Earth Online or Google Maps
- PSC Office of Energy Map Tool
- Scribble Maps

Other Tips

- Use imagery or topographic basemaps
- Utilize screenshots/Snipping Tools as needed
- Text boxes/labels on the map are helpful when used sparingly
- Can the public understand your map?

IIJA Requirements: NEPA

Sample Project Layout:

Proposed layout for PV installation, Battery Energy Storage System, and Electric Vehicle Charging Station.



Red = 100 kW panels

Blue = Battery Energy Storage System

Green = Electric Vehicle Charging Station

Orange = Tree to be removed

Purple = Existing transformer

White Line = Approximately 90 feet of trenching for underground conduit

IJA Requirements: State Historic Preservation Office (SHPO)

For project activities that involve historical, archeological or cultural resources (includes listed and eligible resources over 50 years old or of cultural significance), a review of the undertaking may be required. However, a number of energy related activities have been previously identified that do not have the potential to cause effects on historic properties, even when historic properties may be present. They are covered by an existing programmatic agreement between the U.S. Department of Energy, the Wisconsin State Historic Preservation Office and certain State agencies.

https://www.energy.gov/sites/prod/files/2014/01/f7/state_historic_preservation_programmatic_agreement_wi.pdf

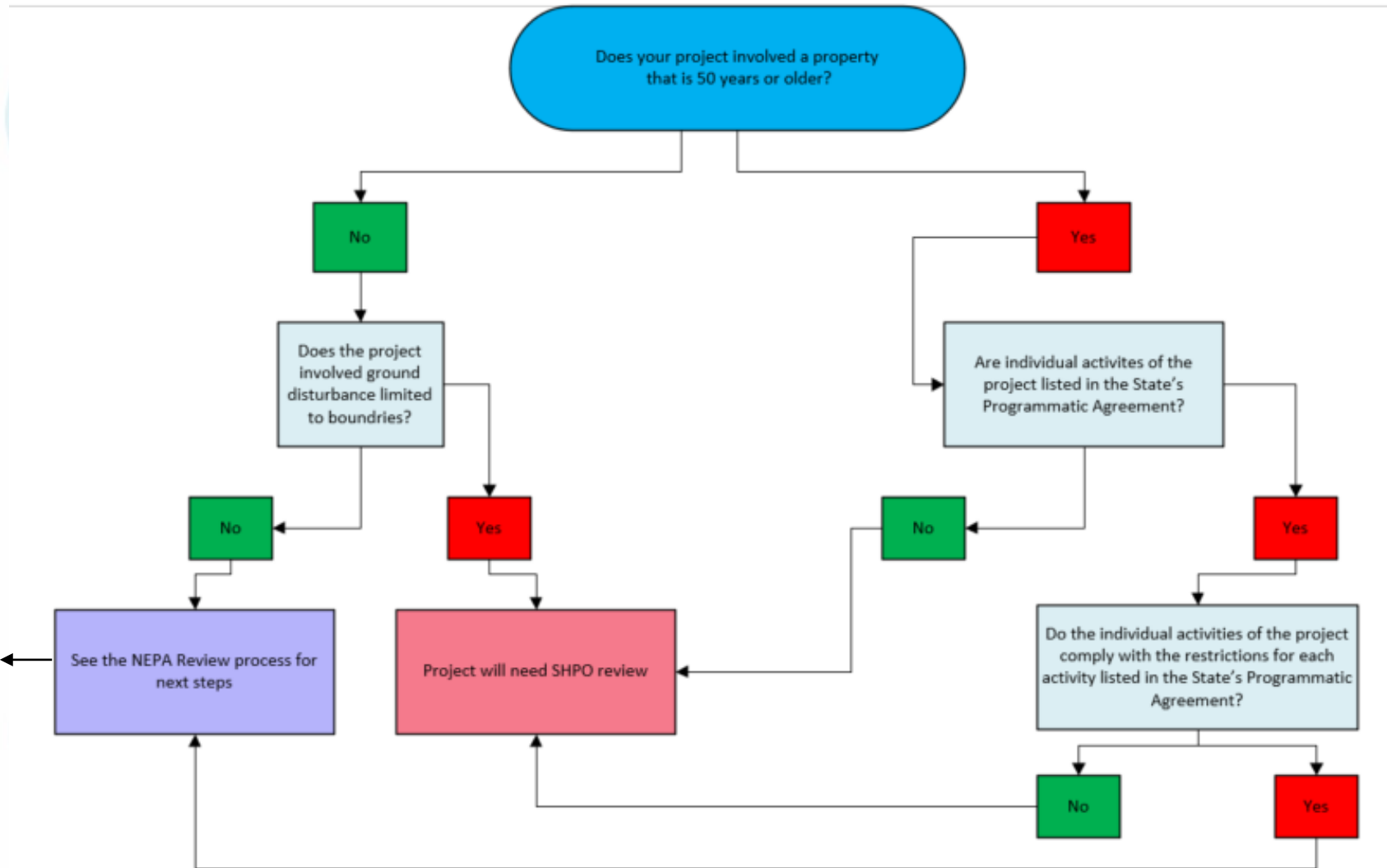
Examples on this list include, but are not limited to:

Replacement of existing HVAC equipment including pumps, motors, boilers, chillers, cooling towers, air handling units, package units, condensers, compressors, heat exchangers that do not require a change to existing ducting, plumbing, electrical, controls or a new location, or if ducting, plumbing, electrical and controls are on the rear of the structure or not visible from any public right of way.

Adding or replacing existing building controls systems including HVAC control systems and the replacement of building-wide pneumatic controls with digital controls, thermostats, dampers, and other individual sensors like smoke detectors and carbon monoxide detectors (wired or non-wired).

IJA Requirements: SHPO

State Historic Preservation Information:



Complete your screening or EQ1 form and submit it to OEI staff

IIJA Requirements: Build America/Buy American(BABA) Provisions

Per Section 70914 of the IIJA *an Agency may not obligate funds for an “infrastructure project” unless all of the iron, steel, manufactured products, and construction materials used in the project are produced in the United States or the Agency applies a waiver to the domestic content procurement preference requirement.*

Buy America Requirement is applicable to:

Infrastructure projects either publicly owned or serve a public function; privately owned infrastructure that is not open to the public, such as a personal residence, is not considered “infrastructure” for purposes of this requirement. In cases where the “public” nature of the infrastructure is unclear, the recipient is required to consult with the DOE Grants Officer who will render a determination.

Project means the construction, alteration, maintenance, or repair of infrastructure in the United States.

IIJA Requirements: Build America/Buy American(BABA) Provisions

B. Buy America Preference

None of the funds provided under this award may be used for a project for infrastructure unless:

1. All iron and steel used in the project are produced in the United States—this means all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States;
2. All manufactured products used in the project are produced in the United States—this means the manufactured product was manufactured in the United States; and the cost of the components of the manufactured product that are mined, produced, or manufactured in the United States is greater than 55 percent of the total cost of all components of the manufactured product, unless another standard for determining the minimum amount of domestic content of the manufactured product has been established under applicable law or regulation; and
3. All construction materials are manufactured in the United States—this means that all manufacturing processes for the construction material occurred in the United States.



IIJA Requirements: Build America/Buy American(BABA) Provisions

B. Buy America Preference (continued)

The Buy America Preference only applies to articles, materials, and supplies that are consumed in, incorporated into, or affixed to an infrastructure project. As such, it **does not apply to tools, equipment, and supplies**, such as temporary scaffolding, **brought into the construction site and removed at or before the completion** of the infrastructure project. Nor does a Buy America Preference apply to equipment and furnishings, such as movable chairs, desks, and portable computer equipment, that are used at or within the finished infrastructure project but are not an integral part of the structure or permanently affixed to the infrastructure project.

- **RFB/RFP Requirements:** OEI will require a copy of your RFB/RFP showing you placed these flow-down provisions in your documentation notifying bidding contractors of these requirements.
- **BABA Equipment Documentation:** A reimbursement will not be processed without all necessary documentation.



IIJA Requirements: Build America/Buy American(BABA) Provisions

DOE's Implementation of the Buy America Requirement for Infrastructure Projects:

[DOE's Implementation of the Buy America Requirement for Infrastructure Projects](#)

[\(energy.gov\)](#) The purpose is to provide information and guidance regarding the Department of Energy's (DOE or Department) implementation of the domestic content procurement preference requirement (Buy America Requirement) for infrastructure projects found in the Build America, Buy America Act (BABA), Title IX of Division G of the Infrastructure Investment and Jobs Act, Pub. L. No. 117-58.

DOE Waiver Requests Resources:

<https://www.energy.gov/management/doe-buy-america-requirement-waiver-requests>

[Guidance on Submission of a DOE Buy America Requirement Waiver Request \(energy.gov\)](#)



IIJA Requirements: Davis Bacon Act (DBA)

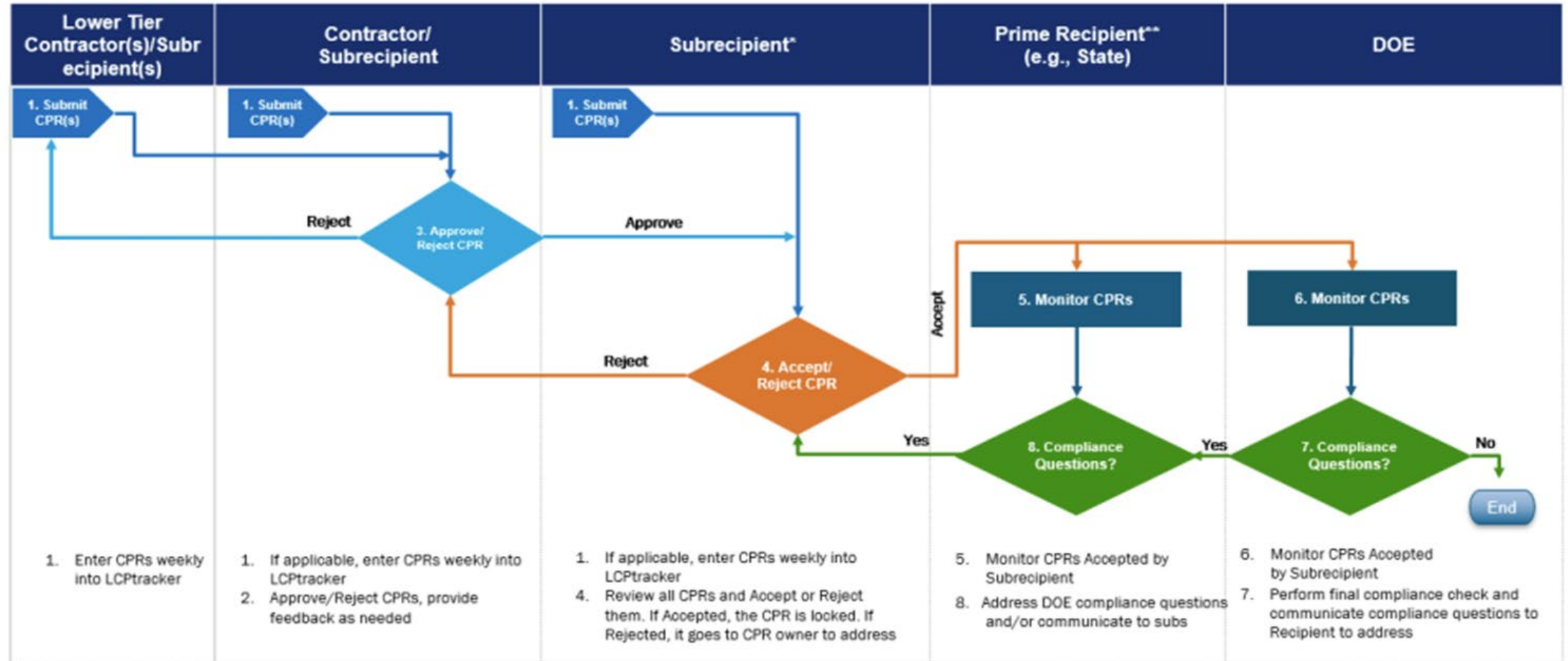
- This Award is funded the Bipartisan Infrastructure Law (BIL). All laborers and mechanics employed by the Recipient, subrecipients, contractors or subcontractors in the performance of construction, alteration, or repair work in excess of \$2000 on an Award funded directly by or assisted in whole or in part by funds made available under this Award shall be paid wages at rates not less than those prevailing on similar projects in the locality, as determined by the Secretary of Labor in accordance with subchapter IV of chapter 31 of title 40, United States Code commonly referred to as the “Davis-Bacon Act” (DBA).
- Wages for specific locations by county and construction type can be found on <https://sam.gov/content/wage-determinations>
- A Desk Guide to The Davis-Bacon Act (including DBRA): [DOE DBA Desk Guide Rev. 2. April 10 2017.pdf \(energy.gov\)](#)
- U.S. Department of Energy Davis Bacon website: <https://www.energy.gov/infrastructure/davis-bacon-act>
- Other resources: [Davis-Bacon and Related Acts Coverage | U.S. Department of Labor \(dol.gov\)](#)

IIJA Requirements: Davis Bacon Acts

- Subrecipients must submit **weekly**, certified payrolls. This ensures that employers are in compliance with the law by paying applicable workers the required prevailing wage and benefits on a weekly basis.
- DOE has contracted with **LCPtracker**, a third-party software application, to make this tracking and submission as accessible as possible. The use of this software is mandatory.
- **This process is currently being established and YOUR account creation and YOUR CONTRACTOR/SUBCONTRACTOR account creation will take place once you are invited by staff (ONLY after the execution of a grant agreement)**
- A comprehensive guide to LCPtracker training, including accessing online training through the system, is available on the LCPtracker website (<https://lcptracker.com/support-training-main>)
- Training will be provided by LCP Tracker training staff



IIJA Requirements: Davis Bacon Acts



Contract Negotiations and Agreements

I have completed by Onboarding Questionnaire, Environmental Screening Tool, and any NEPA paperwork, as requested by my Grants Coordinator, what is next?

Contract Negotiations and Agreements

- What are some items included in a contract/agreement?
 - Scope of Work: This shall include information relating to all the necessary personnel, equipment, and materials to accomplish the tasks. In the event of a conflict between the summary in the Scope of Work and Budget, and the application and/or other supporting documents previously submitted through the application process, The Scope of Work and Budget provided in the contract agreement shall control. Changes to the Scope of Work shall be by written agreement of both the OEI and the Grant Recipient.
 - Budget: This shall include information relating to all costs associated with the proposed project, including match funds, and is considered “Attachment B” in the contract/agreement.
 - The Grant Coordinator assigned to your project may be in contact with you to review your budget, as applied for, to determine all suggested costs are “eligible”, as well as properly placed under the correct expense line item.
 - Special Provisions Relating to work Funded Under IJA
 - Order awarding the grant

Contract Negotiations and Agreements

Can I start any clearing, trenching or constructions activities before I receive my NEPA Determination (if applicable)?



What expenses can be incurred for reimbursement or match during the time prior to my grant agreement being executed?



What information is expected from me AFTER I receive a Grant Agreement?

Upon execution of a Grant Agreement, you may be asked for the following:

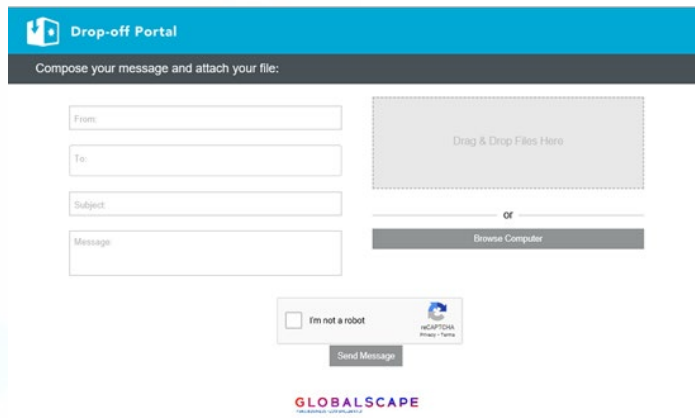
➤ Fiscal Information (do we have everything we need to send you a reimbursement?)

📄 DOA Form 6460 - New Supplier Form

📄 W9 Form

📄 DOA 6456 – Authorization for Direct Deposit

📄 Instructions will be provided for Forms to be completed and returned through a secure email portal
<https://piisftp.wi.gov/messageportal#/dropoff>



The screenshot shows a web interface titled "Drop-off Portal" with a blue header. Below the header is a dark grey bar with the text "Compose your message and attach your file:". The main content area contains a form with fields for "From:", "To:", "Subject:", and "Message:". To the right of the "To:" field is a large grey box with the text "Drag & Drop Files Here". Below this box is a smaller grey box with the text "Browse Computer". At the bottom of the form is a checkbox labeled "I'm not a robot" and a "Send Message" button. The GLOBALSCAPE logo is visible at the bottom of the page.

What information is expected from me AFTER I receive a Grant Agreement?

Within 15 days of an executed Grant Agreement, you will be required to provide:

➤ Affirmative Action Plan & Related Forms (must be compliant to receive reimbursement)

Affirmative Action Required Documentation Summary		
NO EXEMPTION	Forms needed	Who Completes?
	Affirmative action plan Must include: Policy statement Workforce analysis Program goals Plan dissemination Internal monitoring	Grantee Subcontractor if over \$50k
	DOA 3784 (AA plan contractor data)	Grantee, Subcontractor
	DOA 3023 (subcontractor form)	Grantee, Subcontractor
EXEMPTION	Forms needed	Who Completes?
	3024 (request for exemption)	Grantee, Subcontractor
	3023 (subcontractor form)	Grantee, Subcontractor
ADD TO DOA CCP LIST	Forms needed	
	3001 (recommendation form)	Grant Specialist
	3024 (request for exemption, if exempt)	Grantee
	3784 (contractor data, if not exempt)	Grantee

What information is expected from me AFTER I receive a Grant Agreement?

For subrecipients meeting certain spending thresholds, within 180 days after the close of your fiscal year, you will be required to provide:

➤ Single Audit (must be compliant to receive reimbursement)

📄 Non-Federal Grant Recipients, or their assignees, that expend \$750,000 or more during their fiscal year in Federal awards shall comply with the Wisconsin State Single Audit Guidelines issued by the Wisconsin Department of Administration and 2 CFR 200.500 through .521.

📄 For-profit Grant Recipients, or their assignees, that expend \$750,000 or more during their fiscal year in U.S. Department of Energy awards must have a compliance audit conducted for that year in accordance with the provisions of 2 CFR 910.500 through .521

📄 A Non-Federal Grant Recipient that expends less than \$750,000 during the non-Federal entity's fiscal year in Federal awards is exempt from Federal audit requirements for that year, but records must be available for review or audit, and shall confirm in writing that the above audit requirements are not applicable.



Reporting Requirements/Payment Requests

- ▶ **State and Federal reporting requirements.** Subrecipients are expected to submit quarterly, final, and on request, reports to the PSC on the activities, progress of the project, and grant costs to satisfy state and federal reporting requirements. Certain reporting requirements shall continue to be required post-disbursement. Sample quarterly reporting schedule:

Quarterly Reporting Period	Quarterly Report Due
Agreement Effective Date through September 30, 2024	October 15, 2024
October 1 through December 31, 2024	January 15, 2025
January 1 through March 31, 2025	April 15, 2025
April 1 through June 30, 2025	July 15, 2025

- ▶ Reports will be administered by and filed electronically through the Grant System.
- ▶ **DOE Required Property Equipment Inventory.** This form is to provide detailed individual item information in connection with required reports of tangible personal property under Federal assistance awards.

Reporting Requirements/Payment Requests

Eligible Costs

- Eligible costs are those costs which can be audited, and which are directly attributable to contracted activities and identified and approved in the Grant Agreement. All costs are reviewed by OEI staff prior to reimbursement and determined as eligible or ineligible, whether or not an applicant had included them in their application.
- Grant/Match ratio must be maintained throughout the reimbursement process. For example, in the sample budget shown below, the contract amount (reimbursement) shall not exceed \$214,000.00 or 88% of the total project costs.

Category	Contract Amount	Match	Total Project Costs
1) Personnel	\$35,000.00	\$0.00	\$35,000.00
2) Fringe Benefits	\$0.00	\$4,500.00	\$4,500.00
3) Equipment	\$0.00	\$0.00	\$0.00
4) Supplies	\$101,000.00	\$0.00	\$101,000.00
5) Contractual	\$78,000.00	\$0.00	\$78,000.00
6) Other	\$0.00	\$0.00	\$0.00
Total Direct Costs	\$0.00	\$0.00	\$0.00
7) Indirect	\$0.00	\$25,000.00	\$25,000.00
TOTALS:	\$214,000.00	\$29,500.00	\$243,500.00
<i>Percentage of costs</i>	<i>88%</i>	<i>12%</i>	<i>100%</i>

- No eligible costs subject to reimbursement may be incurred prior to the execution of the Agreement.
- Costs only as identified in the Budget and described in the Scope of Work are allowed. A Grant Recipient may request from the OEI an amendment to the budget summary of its Grant Recipient Agreement to add to or revise the list of purchases, expenses, and other activities eligible for reimbursement, not to exceed the original grant amount approved by the Commission.

Reporting Requirements/Payment Requests

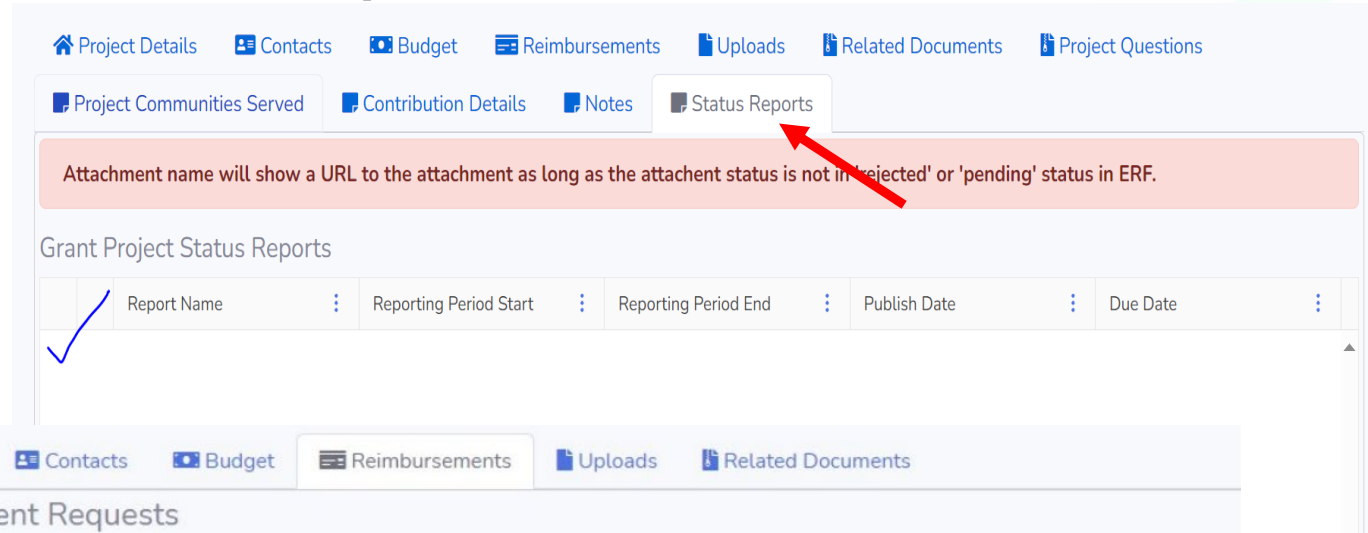
Reporting and Request For Payment:

- Payments are to be used exclusively for eligible costs incurred during the Performance Period. **NO PREAWARD COSTS**
- The OEI will make a reimbursement payment to the Subrecipient upon receipt of a request for payment with satisfactory documentation. **Payments are issued as reimbursements only. Must be paid by grant recipient first.**
 - Multiple requests for payment may be processed and shall correspond with the Quarterly Reports.
 - Each request for payment must include a copy of an invoice for each eligible cost item for which reimbursement is requested.
 - Satisfactory Documentation: The invoice will be used to document the actual purchase price of the eligible cost item. Invoices must be accompanied by a proof of payment, as appropriate. This includes receipts, invoices, and internal accounting records. A request for payment must provide an independent and auditable basis for the actual purchase price of each eligible cost item.

Reporting Requirements/Payment Requests

Reporting Materials for Current Grant Recipients

- ✓ Status Reports (QPRs and FPRs)



Project Details | Contacts | Budget | Reimbursements | Uploads | Related Documents | Project Questions

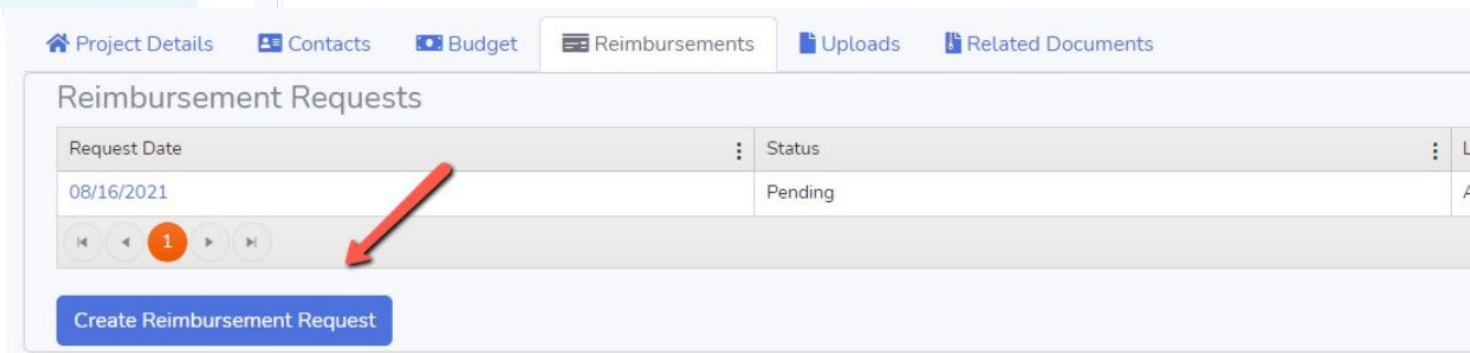
Project Communities Served | Contribution Details | Notes | **Status Reports**

Attachment name will show a URL to the attachment as long as the attachment status is not in 'rejected' or 'pending' status in ERF.

Grant Project Status Reports

Report Name	Reporting Period Start	Reporting Period End	Publish Date	Due Date
✓				

- ✓ Reimbursements



Project Details | Contacts | Budget | **Reimbursements** | Uploads | Related Documents

Reimbursement Requests

Request Date	Status	La
08/16/2021	Pending	Al

« ‹ 1 › »

Create Reimbursement Request

- ✓ Follow instructions in the Grant System User Guide: [GrantsSystemUsersGuide.pdf \(wi.gov\)](#)

Project Budget (Grant Agreement Attachment B)

ATTACHMENT B BUDGET

Category	Contract Amount	Match	Total Project Costs
1) Personnel	\$35,000.00	\$0.00	\$35,000.00
2) Fringe Benefits	\$0.00	\$4,500.00	\$4,500.00
3) Equipment	\$0.00	\$0.00	\$0.00
4) Supplies	\$101,000.00	\$0.00	\$101,000.00
5) Contractual	\$78,000.00	\$0.00	\$78,000.00
6) Other	\$0.00	\$0.00	\$0.00
Total Direct Costs	\$0.00	\$0.00	\$0.00
7) Indirect	\$0.00	\$25,000.00	\$25,000.00
TOTALS:	\$214,000.00	\$29,500.00	\$243,500.00
<i>Percentage of costs</i>	<i>88%</i>	<i>12%</i>	<i>100%</i>

- This data will be transferred from your grant application into the grant agreement and the Grants System
- You will be held to the grant funded/match ratio (88%/12%) if total projects costs increase/decrease (not to exceed the original grant award amount - \$214,000)
- Costs can vary on line items (1-6) under **10%** of total project costs without budget amendment being required (\$243,500 x 10% = **\$24,350**)

Questions?

➤ Any questions on today's presentation?

➤ Questions can be submitted to oei@wisconsin.gov

➤ Answers to those questions will be posted at our website:

<https://psc.wi.gov/Pages/Programs/OEI/EnergyInnovationGrantProgram.aspx>

➤ **FAQ's**