**INSTRUCTIONS FOR CONTENT AND FORMAT OF PROGRESS REPORTS (Revised 9/2024):**

A Quarterly Progress Report shall be completed by the Recipient and submitted to the CAM each quarter. Responses should be complete, even if concise. The information requests included in this report template are necessary to keep a CAM informed of the project’s progress. The Report Template shall not be modified, although the CAM has the flexibility to add information requests as necessary to meet the needs of the project. Instructions are in brackets and should be removed when submitting the report. If a section is not applicable, simply respond “N/A.”

Pilot CAMs and Recipients: Please provide any feedback you have on this form, and feel free to offer suggestions for improvement.

Recipients should be aware that thoroughness and accuracy of their progress reports are very important. If a Recipient consistently submits progress reports that are incomplete, uninformative, or otherwise on the line of unacceptable, that performance is evaluated and can result in various actions such as stop-work orders and negative past-performance assessments.

Quarterly progress reports should be submitted no later than 30 calendars days after each quarter, unless otherwise specified by the CAM.

*Quarterly Progress Reports shall cover the following periods throughout a given year:*

* *1st Quarter: January 1 - March 31*
* *2nd Quarter: April 1 - June 30*
* *3rd Quarter: July 1 - September 30*
* *4th Quarter: October 1 - December 31*

**QUARTERLY PROGRESS REPORT for**

## **[Project Name]**

## **[Agreement Number]**

## **[Month, Year]**

Recipient Project Manager: [Name]

Commission Agreement Manager: [Name]

**Overall Project Status**

[Summarize the status of the project.]

**Significant Milestones, Deliverables, or Meetings Accomplished This Period**

[Include a bulleted list of significant project activities and/or accomplishments. Relate these activities and accomplishments to a deliverable or task listed in the Scope of Work (SOW) and describe why it is valuable to that deliverable or task.

Include the project personnel (including subrecipients or vendors) involved in each activity or accomplishment.]

**Challenges and Potential Agreement Changes**

[Describe any challenges facing the project and how you plan to address the challenges. Identify any potential agreement changes (e.g., no-cost time extensions, budget updates, schedule changes, or site loss/change) that may be required to address the challenge. Identify any assistance the CAM or Energy Commission may be able to provide to assist in resolving the challenge.]

**What We Expect to Accomplish During the Next Period**

[Include a list of significant project activities and/or accomplishments you expect to accomplish the next quarter. Relate these activities and accomplishments to a deliverable or task listed in the Scope of Work.]

**Report on Subrecipients, Vendors, and Site Hosts (if applicable)**

Please provide any relevant information on the status of subrecipients, vendors, and site host(s). Please describe any performance issues you may be having with subrecipients, vendors, or site hosts. Please report whether all subrecipients and vendors have been paid all CEC funds invoiced and received by Recipient to date. Also report any changes to demonstration/deployment site administration or other site challenges that may impact project timeline and/or project progress. Indicate the type of communication that has taken place this quarter.

**Status of Milestones and Deliverables**

[Provide the complete list of deliverables as contained in the current scope of work using the table format below. Highlight in blue the deliverables that are due in the next quarter. Please use **BOLD text** to indicate when actual dates differ from the associated planned dates.]

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Deliverable name | Start Date | | Due Date | | Status  (% Complete) |
| Planned | Actual | Planned | Actual |
| **Task 2.1** |  |  |  |  |  |
| Identify top 3 assessment candidates | 4/15/12 | 4/15/12 | 5/1/12 | 5/1/12 | On-time (100%) |
| Develop test plan | 4/20/12 | **4/10/12** | 7/7/12 | **6/10/12** | **Ahead**  **(100%)** |
| **Task 2.2** |  |  |  |  |  |
| Analyze experimental data | 5/1/12 | **6/1/12** | 1/1/13 | **2/1/13** | **Delayed**  **(25%)** |

**Evidence of Progress**

[If there is a long time between interim deliverables, then attach evidence of progress (e.g., test data, early deliverable drafts, product mock-ups, field site descriptions, preliminary analyses) to allow the Commission Agreement Manager to review progress and gauge the quality of research results.]

**Installed or Delivered Equipment: Pictures and Identifying Information**

[If any equipment with a cost of $100K or more per line item has been installed or delivered this quarter, please include pictures of the installed or delivered equipment along with identifying information such as the equipment name, brief description, serial number, total cost, etc. If not already provided with an invoice, please also provide a copy of the receipt showing that the cost of the equipment has been fully paid.]

**Media**

[Include news articles, photographs, press releases, project websites, or videos that can be used for Energy Commission outreach and reporting. Photographs shall be shot as high quality digital photos (at least 300 dpi). You can send photographs to the CAM electronically or through a URL link. Please also include a report of any negative publicity or public statements about the project.

For each media item, include the following:

* Descriptive title (under 140 characters)
* Citation/source
* Web address (if applicable)]

**Fiscal Status**

[Provide the required information in the table below. The purpose of this table is to help the Recipient and the CAM ensure that project funds are being spent at the expected rate and to ensure that Match Funds are being spent ahead of or concurrent with CEC Funds or per an approved Match Fund Spending Plan. If there are significant discrepancies between the % of funds spent and the % of Agreement term completed to date, or % CEC Funds vs. % Match Funds, please explain why.]

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Budget** | | **Cumulative Approved Invoices** | | **Remaining Balance** | | **% of Agreement Funding Invoiced** | |
| **Cost Category** | **CEC Share** | **Match Share** | **CEC Share** | **Match Share** | **CEC Share** | **Match Share** | **CEC Share** | **Match Share** |
| Direct Labor | $312,500 | $0 | $125,000.00 | $0.00 | $187,500.00 | $0.00 | 40.0% | 0.0% |
| Fringe Benefits | $207,250 | $0 | $93,262.50 | $0.00 | $113,987.50 | $0.00 | 45.0% | 0.0% |
| Travel | $500 | $200 | $250.00 | $110.00 | $250.00 | $90.00 | 50.0% | 55.0% |
| Equipment | $0 | $25,000 | $0.00 | $11,250.00 | $0.00 | $13,750.00 | 0.0% | 45.0% |
| Materials/Miscellaneous | $5,000 | $0 | $1,750.00 | $0.00 | $3,250.00 | $0.00 | 35.0% | 0.0% |
| Subrecipients/Vendors | $51,000 | $31,000 | $22,950.00 | $12,400.00 | $28,050.00 | $18,600.00 | 45.0% | 40.0% |
| Indirect Costs | $0 | $0 | $0.00 | $0.00 | $0.00 | $0.00 | 0.0% | 0.0% |
| Profit (not allowed for grant recipients) | $0 | $0 | $0.00 | $0.00 | $0.00 | $0.00 | 0.0% | 0.0% |
| ***Grand Totals*** | ***$576,250*** | ***$56,200*** | ***$243,212.50*** | ***$23,760.00*** | ***$333,037.50*** | ***$32,440.00*** | ***42.2%*** | ***42.3%*** |
| *Retention Amount Withheld:* |  |  | ***$24,321.25*** |  |  |  |  |  |
| ***Total Paid:*** |  |  | ***$218,891.25*** |  | ***$357,358.75*** |  | ***38.0%*** |  |
|  |  |  |  |  |  |  |  |  |
| ***Retention Method*** | ***Retention will be withheld from each invoice*** | | | |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| *Agreement Execution Date* | 7/10/2018 |  |  |  |  |  |  |  |
| *Agreement End Date* | 3/31/2023 |  |  |  |  |  |  |  |
| ***% of Agreement Term Completed To Date*** | **44.2%** |  |  |  |  |  |  |  |

**Please confirm that Recipient has complied with all grant agreement terms and requirements applicable to date:**

YES\_\_\_\_ NO\_\_\_\_ (If no, please provide a brief explanation.)