# INSTRUCTION OVERVIEW:

The Excel workbook named “Annual Project Metrics and Impact Report” serves as the annual performance report template for grant recipients. As a grant recipient, you will populate this template once a year at the end of each Calendar Year (December 30th). The report should be submitted to your assigned Commission Agreement Manager (CAM).

**Each Annual Project Metrics and Impact Report is due within 15 days of each Calendar Year end date. The due date is January 15th of each year.**

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

**For visually impaired applicants, we have inserted notes at the top of each column containing instructions on how to complete the column based on the following text and fill types.**

* Black Fill: The cells that are blacked out identify columns that are not applicable to the question being asked and therefore do not need to be filled in.
* 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.

# DETAILED INSTRUCTIONS:

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

**General Information**

On **'Project Metrics'** worksheet:

* **Project Organization**: Name of grant recipient 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.

**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. Reference the “Guidance for Bipartisan Infrastructure Law Grid Resilience Formula Grant Metrics Tracking” Guidebook published by the DOE Grid Deployment Office (GDO) for more information.

On **'Project Metrics'** worksheet:

* + **Impact Metric (dropdown)**: Using the provided drop-down menu, select applicable impact metrics that apply to the project. *Insert additional rows as needed to capture all applicable project metrics. To preserve the conditional formatting and drop-down menus in additional rows: right-click on the row you’d like to copy, select “Copy”, right-click on the row number below the location you’d like to add the new row, and select “Insert Copied Cells.”*
	+ **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.](https://cmte.ieee.org/pes-drwg/wp-content/uploads/sites/61/2004-07-NARUC.pdf) If grant recipient 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.
	+ **Value:** 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.

**Job Creation and Training**

On **'Project Metrics'** worksheet:

For each question listed, use the drop-down menu in column “Select from List” (if not blacked out) and provide a numerical value in column “Number” (if not blacked out). Use the “Explanation” column when asked and as needed to provide any further information you think is necessary.

**Workforce Development**

On **'Project Metrics'** worksheet:

As applicable, provide the number of grant recipient employees working on the project and the number of trainees in project-specific programs associated with each demographic category provided. As needed, definitions for disability status and disadvantaged community are provided on the “Definitions” tab.

**Community Engagement Activities**

Recipients should report activities that utilize community engagement in deployment and evaluation approach and any examples of planning, open forums, citizen advisory committees, participatory research and budgeting, memorandums of understanding, letters of support or any other indications of engagement.

On **'Project Metrics'** worksheet:

Select from the drop-down “Yes”, “No” or “Planning” for each of the community engagement activities. For ideas on developing a Community Benefits Agreement see note (indicated in red, located on cell A86).

* **Reference links:** Provide links, if any, to the community engagement event activity.
* **Explanation (Reason Included & Expected Outcomes):** Describe the reason included and the expected outcomes. This should include what your goals were for the event and if it was successful or not.

**Community Engagement Events**

Recipients should report details about events held with community members.

On **'Project Metrics'** worksheet:

* **Event # (Unique Identifier)**: Input a unique identifier (e.g., Event 1, Event 2) for each community engagement event(s) held in support of your project(s), please use a new row for each event held both in-person or virtual.
* **Community Engagement Event Name (Virtual or In-Person**): Identify the name or title of the community engagement event held including in-person and virtual events.
* **Zip Code**: Input the **5-Digit Zip Code** as well as the 9-digit Zip Code (**Zip Code +4**) for each event location. Please use the [Zip Code Lookup elink](https://tools.usps.com/go/ZipLookupAction_input) provided here and in the note if you are unsure.
* **Type of Engagement**: Select the type of engagement applicable for each event held. Definitions are

provided on the “Definitions” tab.

* **Degree of Engagement**: Select the degree of engagement applicable for each event held. Definitions are provided on the “Definitions” tab.
* **Did This Event Include an Open Planning Forum with Participant Polling?** Use drop-down to respond “Yes” or “No.”
* **Number of Attendees**: Input total number of individual attendees for each event held regardless of their community affiliation. Definitions for types of Communities can be found on the “Definitions” tab.
* **Outcomes**: Narratively describe any community inputs and responses. Also explain what your goals were for the event and if it was successful or not.
* **Event links**: Provide links, if any, to the community engagement event held.

*Note: Insert additional rows as needed. To preserve the conditional formatting and drop-down menus in additional rows: right-click on the row you’d like to copy, select “Copy”, right-click on the row number below the location you’d like to add the new row, and select “Insert Copied Cells.”*