

**1U.S. Department of Energy**  
**WEATHERIZATION ASSISTANCE PROGRAM ENHANCEMENT AND INNOVATION (E&I)**  
**ANNUAL REPORT**

Grantee \_\_\_\_\_ Program Year \_\_\_\_\_ Grant Number \_\_\_\_\_

Reporting period \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_

**SUMMARY OF ACTIVITIES DURING PREVIOUS YEAR**

1. Describe the successes, challenges and lessons learned:
  - a. What went well this year? Program highlights, successful projects, etc.
  - b. What challenges were experienced and how did you overcome them?
  - c. What are the major issues you will face in meeting grant goals moving forward?
  
2. Statement of Project Objectives (SOPO) Tasks and Milestones
  - a. Describe the status of each task and milestone from your SOPO.
  - b. Explain any variances between your planned activities and budget and the actual milestone status and expenditures.
  - c. Provide any available detail on project outcomes and performance measures.
  - d. Describe any recommendations and feedback to DOE; for example, technical assistance or guidance required.

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**TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES**

Describe any Training and Technical Assistance (T&TA) conducted with grant funds including training topics, dates, attendees, training provider, etc. Include a description of any partnerships with labor organizations, unions or other organizations.

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**MONITORING AND EVALUATION ACTIVITIES**

Discuss monitoring and evaluation activities conducted during reporting period such as findings, recommendations or concerns issued related to performance and/or work quality, a summary of performance measures not included in the quarterly performance report, and any modifications to the monitoring and evaluation plan for the upcoming reporting period.

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Grantee \_\_\_\_\_

Program Year \_\_\_\_\_

Grant Number \_\_\_\_\_

Reporting period \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_

**LEVERAGING ACTIVITIES**

Describe the project highlights, status of partnerships and planned resource commitments including amount of leveraged funds available and expended, and progress toward the 2:1 leveraging goal.

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**DIVERSITY, EQUITY AND INCLUSION**

Describe actions the applicant has taken to foster a welcoming and inclusive environment, support people from underrepresented groups in weatherization, advance equity, and encourage the inclusion of individuals from these groups in the project. Provide a progress update on the milestones and metrics in the Diversity, Equity and Inclusion Plan.

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**JUSTICE40 INITIATIVE**

Describe progress toward meeting the goal of delivering at least 40% of project benefits to underserved communities, including any challenges experienced and resources needed in future reporting periods.

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Submitted by \_\_\_\_\_ Date \_\_\_\_\_

Type name \_\_\_\_\_

Title \_\_\_\_\_

**OMB Burden Disclosure Statement**

Public reporting burden for this collection of information is estimated to average 16 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0043), Washington, DC 20503.

**PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.**

U.S. Department of Energy  
WEATHERIZATION ASSISTANCE PROGRAM ENHANCEMENT AND INNOVATION (E&I)  
ANNUAL FILE WORKSHEET  
INSTRUCTIONS

The Annual Training, Technical Assistance, Monitoring, and Leveraging Report is to be submitted annually, 30 days after the end of the reporting period.

- Grantee: Name of organization submitting the report.
- Program Year: The beginning and ending dates (mm/dd/yy) for the Program Year reported.
- Grant number: The seven-digit Federal identification number assigned to the grant (R999999).
- Reporting period: The starting and ending dates (mm/dd/yy) for the reporting period for the E&I program year.

Item	Explanation
Summary of Activities	Description of the successes, challenges and lessons learned during the program year and progress reports on the Statement of Project Objectives Tasks and Milestones.
Training and Technical Assistance Activities	Describe any Training and Technical Assistance (T&TA) conducted with grant funds including training topics, dates, attendees, training provider, etc. Include a description of any partnerships with labor organizations or unions to provide training and/or develop apprenticeship programs.
Monitoring and Evaluation Activities	Discuss monitoring and evaluation activities conducted during reporting period such as findings, recommendations or concerns issued related to performance and/or work quality, a summary of performance measures not included in the quarterly performance report, and any modifications to the monitoring and evaluation plan for the upcoming reporting period.
Leveraging Activities	Describe the project highlights, status of partnerships and planned resource commitments, and progress toward the 2:1 leveraging goal.
Diversity, Equity and Inclusion	Describe actions the applicant has taken to foster a welcoming and inclusive environment, support people from underrepresented groups in weatherization, advance equity, and encourage the inclusion of individuals from these groups in the project. Provide a progress update on the milestones and metrics in the Diversity, Equity and Inclusion Plan.
Justice40 Initiative	Describe progress toward meeting the goal of delivering at least 40% of project benefits to underserved communities, including any challenges experienced and resources needed in future reporting periods.

Submitted by: Signature of the person submitting the report.

Date signed.

Typed name and title of the submitter.

PAPERWORK REDUCTION ACT BURDEN DISCLOSURE STATEMENT

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PAPERWORK REDUCTION ACT BURDEN DISCLOSURE STATEMENT

This data is being collected to be used by program staff to track Community Scale recipients' activities, their progress in achieving scheduled milestones, and funds expended. The data you supply will be used to enable program staff to provide required or requested information on program activities to OMB, Congress, and the public.

Public reporting burden for this collection of information is estimated to average 16 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of the Chief Information Officer, Enterprise Policy Development & Implementation Office, IM-22, Paperwork Reduction Project 1910-5157, U.S. Department of Energy, 1000 Independence Ave SW, Washington, DC, 20585-1290; and to the Office of Management and Budget (OMB), OIRA, Paperwork Reduction Project 1910-5157, Washington, DC 20503.

Notwithstanding any other provision of the law, no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a currently valid OMB control number.

*Submission of this data is required.*