**National Clean Investment Fund (NCIF) and
Clean Communities Investment Accelerator (CCIA)
Semi-Annual Progress Report Template**

General Information

Recipient Organization:		Grant Award Number:	
Organization Address:		Grant Award Start Date:	
Point of Contact:		Grant Award End Date:	
Email Address:			

Reporting Period Information

Year: [   ]   ☐ July 1 – Dec. 31   ☐ Jan. 1 – June 30

Instructions

This semi-annual progress report details the work done during each reporting period set out in the Terms and Conditions of the award.
- Please include activities, accomplishments, and progress toward the goals and milestones stated in your workplan. All the information provided should be what was completed within the reporting period, except for projections where noted.
- The report template includes several places to provide quantitative data that can be tabulated. EPA staff will use the data you provide in this report to help quantify program impacts.

- Please include any attachments that help illustrate your progress or accomplishments (news articles, photos of completed projects, marketing material developed, market or planning studies, summary sheets of loans or other financial products provided, etc.). Further instruction for attachments is included in the sections below.
- Where noted, please include the "Project Identifier - Grantee" when referencing a project. This is the same ID assigned to the associated transactions entered in the Greenhouse Gas Reduction Fund (GGRF) transaction reporting database.
- Please contact your Project Officer (PO) if you have any questions about your reporting requirements.

Recipients have 30 days after the end of the reporting period to submit their report. Recipients may submit a request to their Project Officer for an extension of up to 60 days after the end of the reporting period to submit reports. A request may be made once during the period of program performance, and it must include 1) an explanation of recipient's unique circumstance as to why they need the extension; 2) the length of the extension; and 3) the duration of the extension. If a recipient makes a request for an extension for which the duration is less than the period of program performance, then the recipient would need to make another request for extension, if needed.

Program Implementation

Project highlights

Please provide a sample of 3-5 top-line accomplishments for the reporting period. The accomplishments should indicate progress toward a program objective and include a tangible benefit if possible. Please use 30 words or fewer for each accomplishment. If highlighting a project, please include the unique "Project Identifier - Grantee."

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2.	
3.	

For one of the highlights above, please share a short "success story," describing the effect that accomplishment had on a particular household, community, or community lender. Please use between 300 and 1000 words.

Progress Toward Achievement of Outputs, Outcomes, and Milestones

Please describe progress toward achievement of some of the outputs, outcomes, and milestones as articulated in the workplan. Only include progress made during this reporting period (however, please include updates on projects initiated in previous reporting periods when relevant). Please use between 300 and 1000 words. If highlighting a project, please include the "Project Identifier - Grantee."

Community Outreach Completed

Use the tables below to identify a sample of 5-7 key outreach activities completed during this reporting period. Please list the community or stakeholders that were part of the outreach and then a brief description and outcome of the outreach activity. EPA encourages you to consider identifying a diverse sample of outreach activities completed, considering diversity of communities engaged as well as diversity of community outreach strategies and mediums. Examples of stakeholders are community groups, developers, local governments, etc. If there are any work products associated with the outreach, such as marketing material developed, please attach PDF or image copies of those items along with this report.

- **Stakeholders or Organization Name:** Enter the name of the organization or a description of the community or stakeholder(s) contacted.
- **Project ID:** If activities are associated with a project, please include the project ID.
- **Date Completed:** Provide the specific date that the outreach activity was completed. If a specific date is not appropriate, you can provide the month and year.
- **Location Details:** Enter the FIPS code and census tract code of where the outreach activity took place.
- **Zip Code:** Enter the zip code where the outreach took place.

- **LIDAC:** Enter "Yes" or "No" to indicate whether the activity reached any *Low-Income and Disadvantaged Communities* as defined in the Terms and Conditions.
- **Who Attended:** Include broad categories and counts of who attended the meeting or was involved in the outreach. For example, 50 community members, 3 developer representatives, 6 local government representatives.

- **Description of Outreach or Meeting:** Include a description of the outreach completed, including the type of outreach or meeting. For example, community feedback meeting convened between developers and the community, an informational meeting held on your GGRF program, ads used to notify eligible community members of potential benefits under your GGRF award.
- **Outcome of Outreach or Meeting:** Describe how feedback from the outreach or meeting has been incorporated into your work on the program.

Stakeholders or Organization Name	Project ID	Date Completed (MM/YYY)	Location Details (FIPS and Census Tract Code)	Zip Code(s)	LIDAC? (Y/N)	Who Attended	Description of Outreach or Meeting	Description of feedback received (bullet points)	Was feedback summarized publicly? (Y/N)	Outcome of Outreach or Meeting

Media Attention

Optionally, please provide samples of media attention your projects have received during the reporting period. Examples include features in local newspapers, news sources, social media posts about your work, etc. If possible, EPA requests that you include digital copies, such as scanned images, portable document format (PDF) files, or other formats that can be stored with the report.

Challenges in Implementation

If applicable, describe any challenges you encountered during the reporting period and how you overcame or are addressing them. Examples of challenges include difficulty attracting borrowers to the program, difficulty in collecting data from lenders and/or subrecipients, or larger administrative challenges in managing the program. Please use between 300 and 1000 words.

Program Evaluation and Evidence-Building Activities

Please describe any evaluations of GGRF-related program administration and project portfolios conducted during this quarter. Program evaluations may include assessment of effectiveness and efficiency in achieving outputs, outcomes, and objectives. Please use between 300 and 1000 words. If no relevant activities were undertaken during the reporting period, please respond N/A. (For more guidance on program evaluation and evidence-building see EPA's Evaluation Policy and SFA Notice of Funding Opportunity).

Project Pipeline and Plans for Next Reporting Period

Please describe any plans for future work that EPA or your Project Officer should be aware of. This can include metrics describing your transaction pipeline or new ways you plan on reaching the outputs and outcomes in your workplan. Please use between 300 and 1000 words.

Meaningful Benefits

Climate Resilience

Please describe how some of the projects you funded or initiated this reporting period will be resilient to potential climate-related disasters (e.g., hurricanes, wildfires, sea level rise, extreme weather, etc.), how the projects will be addressing climate resilience (i.e., incorporate climate-resilient building codes or standards, nature based solutions, or use climate risk analyses or plans), or any measures taken this reporting period to ensure the climate resilience of your portfolio. Please use between 300 and 1000 words. Please use the "Project Identifier - Grantee" where appropriate.

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Labor and Equitable Workforce Development Implementation

Describe your progress towards implementing your organization's Labor and Equitable Workforce Development Implementation Plan outlined in the award Terms & Conditions. Identify the workforce and labor goals your organization set and your progress toward achieving them. Also specifically address how your organization has advanced 1) job quality, and 2) workforce opportunities for individuals from LIDACs. Please use between 300 and 1000 words.

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Mobilizing Finance

Model Practices

Please describe some successful strategies you have employed in mobilizing public or private capital that you recommend to scale or disseminate more widely. For example, you can provide this information in the form of a business case study on market transformation, or innovations in the financial products and services you are providing. Also, please include what you have already

shared with other organizations regarding best practices if applicable. Please use between 300 and 1000 words. If highlighting a project, please include the "Project Identifier - Grantee."

Innovations in Projects and Financial Products

If applicable, please provide a description of any new or innovative financial products offered attributable to your grant program this quarter, any new or innovative project types funded or financed this quarter, or any updates on innovations introduced in previous quarters. Please use 300 words or less.

Technical Assistance Accomplishments

If applicable, please describe any technical assistance provided during the reporting period as well as benefits and some lessons learned through the process of providing technical assistance through your grant program. Please use between 300 and 1000 words. If describing distinct technical assistance projects, please use the "Project Identifier - Grantee" where appropriate.

Semi-Annual Metrics

Program Income

If the program generates income, please provide a breakdown of income generated within the reporting period in the table below. Please include the cumulative total from the beginning of the award as well.

Income Type	Entity That Generated Income	Income Generated During Reporting Period	Total Income Generated to Date
Principal Repayment	Recipient		
	Subrecipients		
Interest	Recipient		
	Subrecipients		
Loan Sales	Recipient		
	Subrecipient		
Funds Raised*	Recipient		
	Subrecipient		
Other Program Income Generated**	Recipient		
	Subrecipient		
Costs Incidental to Generation of Program Income	Recipient		
	Subrecipient		
Total	Recipient		
	Subrecipient		

*Please see 2 CFR 200.442 for a definition of fund raising.

**Describe the source of any other program income generated, if any:

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Secondary Market Loan Information

If any loans were sold on the secondary market through your GGRF program, please include that information in the table below.

Secondary Market Participation	Number (within reporting period)	Dollars (within reporting period)	Percent of Total Loans (within reporting period)
Total GGRF backed loans sold on the secondary market			
GGRF backed loans sold on the secondary market by type:			
Business Loans			
Consumer Loans			
Commercial Real Estate loans			
Residential Real Estate Loans			
Home Improvement Loans			
Climate Loans			
Other Loans			

Budget Summary

Please provide a summary of expenditures both cumulatively and for the reporting period against your total program budget.

Budget Category	Budget	Expenditures	Cumulative Expenditures	Percentage of Cumulative Expenditures
Personnel	$	$	$	%
Fringe Benefits	$	$	$	%
Travel	$	$	$	%
Equipment	$	$	$	%
Supplies	$	$	$	%
Contractual	$	$	$	%
Construction	$	$	$	%
Other	$	$	$	%
Total Direct	$	$	$	%
Indirect Charges	$	$	$	%
TOTAL	$	$	$	%

Allocation of Expenditures for NCIF Respondents

<mark>The question below is for NCIF program respondents only. If you are a CCIA respondent, please skip to the section below: Allocation of Expenditures for CCIA Respondents</mark>

Please provide a description of expenditures over the reporting period across the different types of allowable activities. The expenditures should be separated by those that were expended in and "for the purposes of providing financial assistance in low-income and disadvantaged communities" and expenditures that were not for those purposes. Please follow the definition of activities included in the grant terms and conditions. For technical assistance, the following types of technical assistance should be assigned to the four categories included below:

Workforce Training
- Workforce training
- Contractor or developer training and capacity building efforts

Financial Product and Service Innovations
- New or innovative financial market-building products and strategies (e.g., tax credits; new underwriting strategies; small business lines of credit (subsidies)

Project-Based Technical Assistance
- Predevelopment outputs (e.g, workplans; feasibility studies; site and building assessments including energy audits and climate risk and/or vulnerability assessments; design support)
- Project deployment assistance activities (permitting support; coordination with utilities; interconnection and transmission support)

Market Building:
- Community Lender capacity building
- Public/community training and outreach (customer education; recruitment)

Activity	LIDAC Expenditures	Non-LIDAC Expenditures
Financial Assistance	$	$
Technical Assistance: Workforce Training	$	$
Technical Assistance: Market Building	$	$
Technical Assistance: Financial Product and Service Innovations	$	$
Technical Assistance: Project Based	$	$
Administration	$	$
Total	$	$

Allocation of Expenditures for CCIA Respondents

The question below is for CCIA respondents only. If you are an NCIF respondent, please skip to the section below: Labor and Workforce (Non-construction)

Please provide an allocation of expenditures for the purposes of providing financial assistance and technical assistance in low-income and disadvantaged communities over the reporting period across the four different types of allowable activities. Expenditures for these purposes include costs for capitalization funding, technical assistance subawards, and technical assistance services—all of which must support projects in low-income and disadvantaged communities—as well as other costs that are reasonable and necessary for the deployment of such financial and technical assistance, including costs for program administration activities.

Activity	Expenditures
Capitalization Funding	$
Technical Assistance Subawards	$

Technical Assistance Services	$
Administration	$
Total	$

Labor and Workforce (Construction)

Please provide select information on an aggregated basis from the U.S. Department of Labor's <u>Form WH-347 (OMB No. 1235-0008)</u> for Davis-Bacon and Related Acts (DBRA)-covered construction projects assisted by GGRF funds awarded to the recipient. Please provide the following information for all projects that were open during any part of the reporting period.

Ex. Labor and Workforce Reporting Template (Construction)						
Open Construction Projects by Month of Reporting Period	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
DBA Construction Category: Residential						
Total Number of Projects	x	x	x	x	x	x
Total Number of Workers	x	x	x	x	x	x
Total Hours Worked	x	x	x	x	x	x
Rate of Pay (Per Worker Median)	x	x	x	x	x	x
Share of Workers Above DBA Prevailing Wage	x	x	x	x	x	x
DBA Construction Category: Building						
Total Number of Projects	xx	xx	xx	xx	xx	xx
Total Number of Workers	xx	xx	xx	xx	xx	xx
Total Hours Worked	xx	xx	xx	xx	xx	xx
Rate of Pay (Per Worker Median)	xx	xx	xx	xx	xx	xx
Share of Workers Above DBA Prevailing Wage	xx	xx	xx	xx	xx	xx

Additional Attachments

Please list any additional attachments (graphics, photos, other) submitted with this progress report.