



eProjectXpress

ANNUAL PERFORMANCE PERIOD M&V UPLOAD TEMPLATE

Project Contact Information	Role	Institution	Name	Email	Phone
	Project Administrator or Owner's Rep				
	Project Initiator (Customer)				
	Project Builder (ESCO)				
	ESCO M&V Specialist				
	Other M&V Contact (if applicable)				
	Third Party Verifier (if applicable)				

Project Identification	
ePB/ePX Project ID#	
Project Name	
Key Dates	
Project Acceptance Date (mm/dd/yyyy)	
Performance Year* (choose from dropdown) ¹	
CURRENT M&V Report Due Date (mm/dd/yyyy)	
CURRENT M&V Report Submitted Date* (mm/dd/yyyy)	
CURRENT M&V Report Approved Date (mm/dd/yyyy)	
CURRENT Third Party Verification Report Date (if applicable) (mm/dd/yyyy)	
NEXT YEAR M&V Report Due Date (mm/dd/yyyy)	

Verified Project Resource Savings for the Year ²	
Electricity Savings Verified for the Year (kWh)	
Electricity Cost Savings Verified for the Year (\$)	
Electric Demand Cost Savings Verified for the Year (\$)	
Natural Gas Savings Verified for the Year (Units)	
Natural Gas Savings Verified for the Year (qty)	
Natural Gas Cost Savings Verified for the Year (\$)	
Other1 Savings Verified for the Year (type)	
Other1 Savings Verified for the Year (units)	
Other1 Savings Verified for the Year (qty)	
Other1 Cost Savings Verified for the Year (\$)	
Other2 Savings Verified for the Year (type)	
Other2 Savings Verified for the Year (units)	
Other2 Savings Verified for the Year (qty)	
Other2 Cost Savings Verified for the Year (\$)	
Water Savings Verified for the Year (kGall)	
Water Cost Savings Verified for the Year (\$)	
Operational and Maintenance Savings Verified for the Year (\$)	

Annual Verified Cost Savings – Project-Level ³	
Verified Project Cost Savings for the Year (\$)	
Guaranteed Project Cost Savings for the Year (\$)	
Cost Savings Shortfall or in Excess of Guaranteed Savings (\$) (Enter negative number for shortfall)	
Not Applicable During Performance Period	

Annual Verified GHG Emission Reductions ⁴	
CO2 Savings Verified for the Year (tons)	
CH4 Savings Verified for the Year (tons)	
Total Carbon Reduction (CO2 and CH4) Verified for the Year (tons)	
SOX Savings Verified for the Year (tons)	
NOX Savings Verified for the Year (tons)	
Other GHG Savings Verified for the Year (tons)	

Verified Job Impacts ⁵	
Impacts from Project Implementation (# of FTEs resulting from project development, IGA and through final acceptance of implementation)	
Impacts this Performance Period (# of FTEs resulting from current performance period year)	

Remaining Financial Obligations	
Remaining Loan Balance	

IMPORTANT INFORMATION:

¹ To enter construction period (implementation period) savings, Choose "Post-Installation Verification" from the "Performance Year" dropdown (cell C16); the user may then enter Verified Construction Period Savings (\$) in cell C27. Please note that if the "Performance Year" is year 1 or higher, the "Verified Construction Period Savings (\$)" field (C27) is not applicable, and any information it contains will not be ingested when the report is uploaded.

² For Post Installation Verification, the savings entered into cell C24 are the *expected* annual savings according to the post-installation verification report, rather than annual verified savings.

³ For Post Installation Verification, the savings entered into cells F13 through F29 are the *expected* annual savings according to the post-installation verification report, rather than annual verified savings. For the purposes of this ePX M&V template, the term "Verified" indicates information that has been submitted to and approved by the Owner as a part of the work of the project. Values herein only repeat information that has been otherwise presented and approved as a part of the work of the project. Any conflict or difference in values shall defer solely and completely to the ESPC project contract information.

⁴ To calculate achieved GHG emissions from electricity and natural gas, you may use EPA's Energy Savings and Impacts Scenario Tool (ESIST) and enter the results into the ePX M&V template. Access the ePX ESIST User Guide on the Help and Documentation page (<https://eprojectbuilder.lbl.gov/help>) under the eProject Xpress Training Documentation link. Alternatively, the following two tools can help you calculate GHG emissions from electricity, natural gas, and vehicles. 1) EPA's eGRID (<https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>) enables you to estimate CO2e from your electricity consumption: identify the "Total Output Emissions Rate" CO2e multiplier for your eGRID region (Table 1) and multiply your project's annual MWh by this multiplier. 2) EPA's Greenhouse Gas Equivalencies Calculator (<https://www.epa.gov/energy/greenhouse-gas-equivalencies-calculator>) enables you to estimate CO2e from natural gas and/or passenger vehicles: add the CO2e from the vehicle, natural gas, and passenger vehicle. Note: this tool also calculates GHG emissions from electricity, but DOE recommends using the eGRID tool for electricity because eGRID provides region-specific emissions factors as opposed to using a national average.) Sum the CO2e emissions from Step 1 and Step 2. Units are all in tons and are all in the same units or converted beforehand.

⁵ To estimating job creation impacts, you may wish to use U.S. DOE's Federal Energy Management Program multiplier: 1 job year per \$125,000 of project investment – to estimate job creation from federal ESPC projects. Divide your total project investment amount (\$) by \$125,000, or use another jobs conversion factor you've identified, to estimate the number of job years your project will create. Note: Non-federal users should defer to the applicable state and local statutes for any final determination of how to calculate GHG emission and job impacts. Project implementation FTEs typically include ESCO personnel, subcontractors, vendors, and manufacturers reps but not truck drivers or manufacturing plant personnel. Performance period FTEs typically include ESCO M&V personnel, specialty required additional O&M personnel that were not already a part of the Owner's staff, M&V report generation and presentation. However the specific scope and definition of applicable FTEs must be determined by the applicable laws and regulations and authorizing jurisdiction for this project.

INFORMATION ABOUT CELL COLOR-CODING:	
Yellow Background	All fields in yellow are optional entry fields
Gray Background	All fields in grey are populated from the project entered into the ePB system
Light Yellow Background	All fields in light yellow are populated from the project entered into the ePB system, but can be edited for this annual M&V report

ADDITIONAL USER-ENTERED NOTES: