***Authority****: T.C.A. § 49-17-104.*

**LOAN RULE 0520-13-1.09 REPORTING REQUIREMENTS**. *Loan recipients will provide monthly progress reports to EESI during the construction phase of the project. All projects must be professionally commissioned and a commissioning report submitted to EESI. Loan recipients must enter baseline utility consumption and cost data in Energy Star Portfolio Manager for each facility for the year prior to project implementation, and shall update that data each month during the payback period. EESI shall be given access to reports on such data upon request. If loan projects are undertaken under a performance contract, the loan recipient shall require the contractor to provide annual measurement and verification reports.*

**Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_**

**Project Start Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_ Project Completion Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_**

**Contractor Name:**

**School District:**

**Project Name:**

**Project Narrative:**

**Executed Loan Agreement: \_\_\_\_\_ Yes \_\_\_\_ No**

Loan Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Execution Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**County/Board Resolution \_\_\_\_\_ Yes \_\_\_\_ No**

Execution Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**Attorney Opinion Letter: \_\_\_\_\_ Yes \_\_\_\_ No**

Submission Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**TVA M&V Completed: \_\_\_\_ Yes \_\_\_\_ No**

Pre-measurement Completion Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

Post-Measurement Completion Date: ­­ \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**Commissioning Completed: \_\_\_\_\_ Yes \_\_\_\_ No**

Date:\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**Commissioning report submitted to EESI: \_\_\_\_\_ Yes \_\_\_\_ No**

Submission Date: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_

**EnergyStar Portfolio Manager Account created and Data added for each school in the district:**

<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager>

**Portfolio Manager Account Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Properties shared with EESI: \_\_\_\_\_ Yes \_\_\_\_ No**

**PROJECT CHANGES:** (List any changes from original scope and date of approval)

**LESSONS LEARNED:** (List any tips that other school districts might find helpful)

Report Prepared By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:  **\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_**