

**Exhibit O**

**ECONOMIC DEVELOPMENT ADMINISTRATION  
PROGRAM PERFORMANCE REPORT  
SECTION 201 AND 209 CONSTRUCTION PROJECTS**

**REPORTING PERIOD:**  PROJECT COMPLETION  3 YEARS  6 YEARS

EDA Project No.: \_\_\_\_\_ Date of EDA Grant Award: \_\_\_\_\_

**I. GRANTEE ORGANIZATION:** (*Information in italics will be generated from OPCS - do not enter*)

- 1. Grantee Name: \_\_\_\_\_
- 2. Address: \_\_\_\_\_
- 3. Telephone: \_\_\_\_\_
- 4. Fax: \_\_\_\_\_
- 5. E-mail Address: \_\_\_\_\_
- 6. Contact Person: Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**II. EDA PROJECT INFORMATION:**

1. EDA Project Budget:

	<i>Approved</i>	<i>Final (Actual)</i>
EDA Funds	\$ _____	\$ _____
Applicant	\$ _____	\$ _____
Local Funds	\$ _____	\$ _____
State	\$ _____	\$ _____
Other Federal	\$ _____	\$ _____
Other	\$ _____	\$ _____
Total Project Dollars:	\$ _____	\$ _____

2. Construction Schedule: *Estimated*                      *Final (Actual)*

- a. Start Dates: \_\_\_\_\_
- b. Completion Dates: \_\_\_\_\_

3. Project Location: \_\_\_\_\_  
County/                      State/                      Zip Code

4. Project Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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**III. OUTCOMES (Actual at time of report)**

1. Permanent Jobs

- a. Number of Jobs Created: \_\_\_\_\_
- b. Number of Jobs Retained: \_\_\_\_\_
- c. Total Number of Direct Jobs: \_\_\_\_\_

2. Additional dollars invested:

	<i>Direct</i>	<i>Indirect</i>
a. Private sector:	\$ _____	\$ _____
b. Local public:	\$ _____	\$ _____
c. State:	\$ _____	\$ _____
d. Other Federal:	\$ _____	\$ _____
e. Totals:	\$ _____	\$ _____

3. Increase in Local Real or Business Property Tax Base:

- a. Enter value of increase in tax base (prior to any abatement): \$ \_\_\_\_\_
- b. Is the project located in a Federal Empowerment Zone or Enterprise Community? Yes \_\_\_\_\_ No \_\_\_\_\_
- c. Is the project located in a State enterprise zone? Yes \_\_\_\_\_ No \_\_\_\_\_

4. Local Capacity Anticipated and Actual Results: Weigh each objective based on anticipated benefits (total should not exceed 100%) then rate each objective on actual performance (with 10 being the highest).

	Weight (0-100%)	Actual Results (Rate of 1-10)
a. Created infrastructure to support private investment:	_____	_____
b. Created infrastructure to stimulate private investment:	_____	_____
c. Stabilized and maintained the local economic base:	_____	_____
d. Diversified the local economy:	_____	_____
e. Other non-quantitative benefits	_____	_____
Specify: _____		

5. Indirect Benefits: Estimate the number of local businesses that realized significant increases in sales or employment due to indirect project affects (i.e. increased consumer/supplier demand): \_\_\_\_\_

**V. Please submit a good quality photograph of the EDA project and/or firms assisted.**

**AUTHORIZED CERTIFYING OFFICIAL**

Signature: \_\_\_\_\_ Date Report Submitted: \_\_\_\_\_

Typed or Printed Name & Title: \_\_\_\_\_ Telephone: \_\_\_\_\_

**GRANTEE REPORTING INSTRUCTIONS  
PROGRAM PERFORMANCE REPORT  
SECTION 201 AND 209 CONSTRUCTION PROJECTS**

**Burden Statement:** 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 0610-0096, Expires 11/30/2002. The public reporting burden for this collection is estimated to average 3 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: Economic Development Administration, Herbert C. Hoover Building, Washington, DC, 20503

The instructions below correspond to items in the Core Performance Measures Report. If there is not sufficient space on the reporting form for a response, please respond on an attachment to the report.

Please check the top of each page to be sure that the EDA project number, date of grant award, and reporting period are entered correctly. Review the data provided on Page 1 from EDA's database. Make any corrections required to update information on the grantee organization. If no data is shown, please follow the instructions below to complete the report.

#### **PART I: GRANTEE ORGANIZATION.**

1. **Grantee Name:** Enter the legal name of the Grantee.
2. **Address:** Enter the physical address of the Grantee.
3. **Telephone:** Enter the telephone number, including area code, of the Grantee.
4. **Fax:** Enter the facsimile number, including area code, of the Grantee.
5. **E-mail Address:** Enter the Internet address of the Grantee.
6. **Contact Person & Title:** Name the person to contact on matters related to this report. Also, provide the contact person's telephone number, including area code, if different from the Grantee's telephone number. Please include current email address in the following format ([name@organization.com](mailto:name@organization.com)). Example: [jdoe@eda.gov](mailto:jdoe@eda.gov).
7. **Project Location:** Enter the county, state and **zip code** of project location.

#### **PART II: EDA PROJECT INFORMATION.**

##### **1. EDA Project Budget:**

Enter the project budget as estimated at time of approval.

Enter the actual project budget at time of project completion and close-out.

Enter only dollars used as part of the EDA total project cost for the construction project (scope of work and eligible costs defined in the grant agreement).

## 2. Construction Schedule:

a. *Construction start date: Enter the estimated date (specified in the Special Award Conditions) for starting construction on the EDA project. Also, enter the actual date (substantiated by the Grantee's construction records and source documentation) for starting construction on the EDA project.*

b. *Construction completion date: Enter the estimated date (specified in the Special Award Conditions) for completing construction on the EDA project. Also, enter the actual date (substantiated by the Grantee's construction records and source documentation) for completing construction on the EDA project.*

**3. Project Location:** Enter county, state and **zip code** of project location.

**4. Project Description:** Provide a complete description of the project constructed with EDA funds.

## **PART III: OUTCOMES (Actual at time of report)**

### 1. Permanent Jobs:

a. **Number of Jobs Created:** Enter the number of private sector jobs created by businesses and other project beneficiaries as a result of the EDA construction project. In tallying direct jobs, only *permanent* and *direct* jobs may be counted. If a business employs a large number of part-time workers; *part-time* jobs should be converted to full-time equivalents (by summing the total hours worked per week for all part-time employees and dividing by the standard hourly work week for full-time employees, normally 35-40 hours).

Direct jobs include those by employers located at the project site or by require services of the EDA-funded facility in order to locate, expand or operate in the project area. Applicants normally estimate the number of direct jobs anticipated as result of the project and often identify employers or project "beneficiaries" that will benefit from the project and create job as part of the application. In addition, to the direct jobs anticipated at the time of application, grantees should report other direct or *directly-related* jobs, including subsequent employers that locate or expand in the project area as a result of the project. For some projects ( e.g., roads, water and sewer lines) directly-related jobs may include those created by firms that were not originally anticipated as part of the project; however, required the facility or service provided by the EDA-funded project in order to locate or expand in the area.

b. **Retained jobs:** Enter the number of permanent jobs retained by project beneficiaries as a result of the EDA construction project. Retained jobs are normally included in the application as estimates provided by applicants for identified "beneficiaries" that need the project or service provided by EDA-funded facility in order to continue operating in the area.

c. Total jobs: Add the number of created jobs to the number of retained jobs and enter the total jobs.

**NOTE: Do not report indirect jobs.** (*Jobs created within the local labor marked area by the EDA project through increased supplier or consumer demand-commonly referred to as spin-off jobs resulting from increased employment by local suppliers and increased commercial/retail jobs due to increased wages generated by direct jobs.*) Report indirect benefits under item 5 below.

## **2. Additional Dollars Invested:**

**(NOTE:** Dollars should be separated between: (1) dollars invested in the EDA construction project; and (2) dollars directly related to, but not a part of, the EDA construction project. Dollars invested in the EDA construction project are the non-Federal matching funds that were identified at the time of EDA grant approval and are included in the total project costs for the construction project shown in Section II above. Do not double count these dollars below.)

Additional dollars invested include dollars that support project objectives, but are not included as part of the EDA project costs. Though occasionally difficult to quantify an attempt should be made to identify, and estimate the value of other public and private investments directly related to the EDA project.

Examples are private investments in business facilities served by the project or other related facilities that were constructed with other public or private funds as a result of the EDA project. Also include investments by firms using residual capacity of EDA-financed infrastructure (notably water and sewer services) as indirect investments.

1. Private sector: Enter the total dollars from private sector investors, employers and other private sector sources such as the local financing institutions, and private donors. Include private investment in plant and equipment.

b. Local public: Enter the total dollars from local public sources such city/county appropriations, G.O./revenue bond issues, and economic development sales taxes.

c. State: Enter the total dollars from state sources such as state appropriations and CDBG funds to the state.

4. Other Federal: Enter the total dollars from other Federal sources as HUD, Agriculture, and Transportation funds.

e. Totals: Add the other dollars from lines a through d and enter the total dollars on line e.

## **3. Increase in Local Tax Base:**

Enter the dollar value of the increase in the local tax base (the taxable real and business/personal property base) attributable to the EDA project. This is the value of the investment or the property prior to any form of tax abatement. Indicate if the project is located in a federal empowerment zone or enterprise community, or state enterprise zone.

**4. Local Capacity Anticipated and Actual Results:**

Identify the primary objectives for this project at the time of grant award and assign a weight to each based on relative importance (e.g., if two objectives are equally weighted enter 50% for each). Next, evaluate the level of success the project has achieved to date in meeting each objective. Individual ratings (with 10 being the “best” (i.e., the project has totally met the objective in every conceivable way) and 1 being the “worst” (i.e., the project has not met the objective in any way at all)).

Determine if the project has resulted in any unanticipated benefits. As an example, a project may have initially been intended to support a single private business (100%), but may actually have resulted in creating jobs associated with other businesses, perhaps diversified the local economy, or provided other community benefits. Significant benefits not fully anticipated at the time of applications should be noted.

**NOTE:** A narrative explaining results or any unique situations associated with the project may be submitted as an attachment to this report, if desired.

**5. Indirect Benefits:** Report the estimated number of businesses that are realized from significant increases in sales and/or employment due to increased consumer or supplier demands generated by the project.

**IV. Provide a photograph of the project and/or business activity assisted by the project** (*The best pictures are those showing people at work or some form of business or investment activity*).