

From: Kiera Bulan <kbulan@ashevillenc.gov>
Subject: Re: Invoice - Q3 FY23 Blue Horizons Project
To: Jamie Wine <jamie@greenbuilt.org>
Cc: Amber Gilot <amber@greenbuilt.org>; Bridget Herring <bherring@ashevillenc.gov>; Hannah Egan <hannah@greenbuilt.org>; Jackie Hamstead <Jackie.Hamstead@buncombecounty.org>; Sam Ruark <sam@greenbuilt.org>
Sent: May 4, 2023 1:47 PM (UTC-04:00)

Great, thanks,

I've added the last outstanding links and notes to the documentation spreadsheet to be sure our conversations and documentation is transparent to reviewers who are not as in the weeds as we are.

I'll move the City's invoice along for payment.

cheers,

Kiera

On Mon, May 1, 2023 at 1:28 PM Jamie Wine <jamie@greenbuilt.org> wrote:

I've updated the invoice sheet with these files. They're also in the invoicing folder.

I've updated the invoices as well to the new total: \$26,056.21

On Sun, Apr 30, 2023 at 5:46 PM Kiera Bulan <kbulan@ashevillenc.gov> wrote:

Thanks Jamie,

I've put what I think are the last two requests/needs as comments in the document. Need payment documentation to J. that matches the invoiced amount (\$1,500) or the total paid (\$3,000) with a note indicating that the expense was billed 1/2 to city 1/2 to county, currently only seeing one receipt for \$2,000.

Also need the documentation of payment to Vandermusser linked.

thanks!

Kiera

Kiera Bulan, she/her/hers

Sustainability Program Manager

Sustainability Department

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On Fri, Apr 28, 2023 at 1:31 PM Jamie Wine <jamie@greenbuilt.org> wrote:

Okay, I've added payment receipts for J Hackett to the folder and linked them to the invoice documentation.

We have sent Amy \$6,000, I'll get that one documented as well.

However, this means I need to adjust the invoice down by \$6,000 since we can't bill that until Q4.

There's plenty of BIPOC engagement to be done. I will work with J on expanding his scope to spend that down before June 30.

On Fri, Apr 28, 2023 at 12:48 PM Kiera Bulan <kbulan@ashevillenc.gov> wrote:

Thanks for your responses Jamie, I've addressed each below:

- On row 6
 - the transition to deliverables payment only encompasses materials and supplies (i.e. ESN or programming supplies required to make presentations, etc) for services performed to support contract deliverables (equity analysis, M&V, etc) we need the documentation of product to date or final product and documentation of payment made. For example, [REDACTED] is an FY22 documentation of payment to Vandermusser for M&V that GBA provided.
 - Also on this deliverable, I'm seeing documentation of the 100% renewable energy plan survey report, but still am not able to access any reports or documents in the third link labeled "taskforce report", I've requested access. To my other point on this deliverable, per the contract agreement you've included, only \$4,000 is eligible to be billed to this contract, #1 in the scope of work, 'Equity Review of the Blue Horizons Project Community Council practices'. I bring this to your attention because there will be \$1,500 remaining in this line item on the current course of action, if you would like to allocate those resources we can discuss that addition or pivot, but #2 in J. Hackett's scope of work is outside of this contract.
- On row 12 -
 - I hear you on the work you're putting in and Amy's putting in behind the scenes, but there is a clear contract output that includes "Vandermusser will present M&V report to BHPCC in March 2023. This was included in this year's contract intentionally alongside the shift to the calendar year reporting structure in an effort to more meaningfully include the full BHPCC in the evaluation process and recommendations for program and resource decisions.
 - Also, I neglected to note this in the previous email but we also need proof of payment on this item (similar to j. Hackett invoice payment) as this is a reimbursement contract, you must provide proof of payment and documentation of services provided to request payment. If the payment has not yet been made to Amy then this request should be moved to Q4, payment receipt should be provided and the full scope of outputs will be complete including her presentation which will hopefully spark some dialogue and ongoing strategic thinking.

I'm headed out of town for a conference Monday-Wednesday, but will work with you to get this processed as I'm able to from away, and, if not am confident we can get payment going next week. Let me know if a phone call is helpful,

Kiera

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On Fri, Apr 28, 2023 at 10:10 AM Jamie Wine <jamie@greenbuilt.org> wrote:

Hi Kiera,

I'm going through the narrative and spreadsheet comments now, we're pretty close there. Hannah and Summer will help me with a couple of the comments to be as precise as possible.

For Row 6:

I was under the impression we moved away from 'time and materials' billing and had moved into 'deliverables completed.' J has produced 2 products, and he's going to help us convene folks, live, probably this week as another deliverable. If we deliver on BIPOC outreach, would we not be able to bill for the full amount? Or, is that just for ESN weatherization billing we're doing that?

Would it be helpful for you if I added a longer section about this to the narrative? If the contract with J and the invoices he submitted are not sufficient documentation, do you want a copy of the cleared check, or do you need something else?

Row 12:

Amy talking at the meeting is like the tip of the iceberg. Her writing the report, submitting it as complete, and the work we do on our side to complete it is like 99% of the work. I guess I assumed here that this was sufficient to bill for the full amount. There's no other work to bill on this item, it would be cleared out. We have already paid Amy \$6,000 for her services, and \$6,000 more once we get paid by y'all.

Thank you,
Jamie

On Wed, Apr 26, 2023 at 1:32 PM Kiera Bulan <kbulan@ashevillenc.gov> wrote:

Hi Team,

Jackie and I have reviewed the invoice and documentation and have a couple of questions that need to be clarified/resolved before we can process payment. There are also a number of comments/questions/suggestions included in the [REDACTED] that do not directly impact invoice processing but will be important for us to get clear on as we head into Q4 and

contract close out. I'll highlight the main issues in this email and welcome engagement to resolve or discuss more on the other items in the document.

- 1- (row 6) need documentation of "paid" on the \$3,000 paid to date to J. Hackett - invoices are included, please ask for receipts that document payment
sub topic here that is not critical to Q3 invoice, but should be discussed is the inclusion of equity analysis specific to 100% renewable energy strategic plan that is outside the scope of this contract. If I'm reading the contract agreement with J accurately it looks like excluding that work will leave \$1,500 on the table across city/county contracts. I wonder if there are other funds supporting this work and/or if there are other plans to spend down this line item for expenses within scope ?
- 2-(row 12) - see comment, curious about plan for Vanderusser presentation to BHPCC - this needs resolution as it may impact the total \$ billed for Q3
also related to comment conversation in row 3 about reporting out to full BHPCC in the interest of developing structures and systems to have deep program evaluation and discussion at the advisory committee level actually inform work and contract deliverables

Other comments and questions are reiterations of the need to keep 100% renewable strategic plan work out of scope, I think the text in the [REDACTED] is adequate. It looks from Jamie's comments on the Community Engagement tab row 11 that we expect to utilize these funds to support direct engagement as recommended by equity analysis process.

Let us know if there are additional questions or comments to move the invoice processing along.

thanks!

Kiera

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Thanks Jamie,
I've got invoice review on my calendar for tomorrow, I'll be in touch with any questions.
cheers,
Kiera

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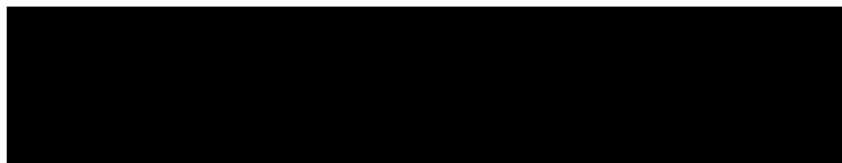
On Thu, Apr 20, 2023 at 11:37 AM Jamie Wine <jamie@greenbuilt.org> wrote:
I made a transpose error, and pulled Q1's total instead of Q3. Apologies.

The total for this quarter is \$29,056.21, I'm attaching a new invoice.



On Mon, Apr 17, 2023 at 5:50 PM Jamie Wine <jamie@greenbuilt.org> wrote:
Hi Kiera and Bridget,

Please see our invoice and documentation attached. Within the documents and spreadsheet there are links to relevant back up.



Let me know if you have any questions,
Jamie

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Jamie Wine

Clean Energy Program Manager **GBA FY23 Invoice document...**
Green Built Alliance
828-254-1995 (o)
206-830-0015 (c) **Green Built Alliance Q3 Invoi...**
Pronouns: He/Him/His <https://www.mypronouns.org/what-and-why>

PO Box 2594
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