EXHIBIT B: INVOICING GUIDELINES FOR CONTRACTORS

Invoice templates are available upon request

Contents of Monthly Invoice Package

- **Invoice Due:** By the 5th calendar day of the month following the month in which the expenses were incurred.
- **Required Information:**
  - Date of invoice
  - Contract number
  - Month of service
  - Unique invoice number (use the same invoice number if invoice is revised)
  - Clearly labeled dollar amounts as allocated in the Purchase Order, Exhibit A (Statement of Work), or as specified in the Contract terms:
    - See “Financial Terms” below for “Time and Materials” invoice requirements.
    - See “Financial Terms” below for “Fixed Fee” invoice requirements.
- **Attachments:**
  - Financial documentation including:
    - All expense forms, receipts, itinerary, etc. that support items on the invoice.
    - For **gift card expenses**, invoice must include additional documentation itemizing the gift card denomination, recipient name, recipient email address or physical address, date provided to recipient, and description of incentivized activity.
  - Progress Report:
    - Template in compliance with the format and requirements provided in Exhibit C of the Contract, or as otherwise agreed upon with the NEEA contract owner.
    - Purchase Orders are generally exempt from this requirement.

Submittal of Invoice Package

- **To submit electronically (preferred method):**
  - E-mail to: Billing@neea.org

- **To send by mail:**
  - Northwest Energy Efficiency Alliance, Inc.
    Attention: Accounts Payable
    421 SW Sixth Avenue, Suite 600
    Portland, OR 97204

Invoice Allocations Based on the Financial Terms

- **Time and Materials Contracts:**
  - Invoice amounts need to be allocated by Task as indicated in the Purchase Order, Exhibit A (Statement of Work), or as specified in the Contract terms.
  - Include the number of hours worked and hourly rate for each contributor (as detailed in Exhibit A or Purchase Order).
  - Project Costs and Expenses:
    - **Receipts for all requested reimbursements must be organized in the order of appearance on invoice.**
    - Itemized Subcontractor Invoices (following the same invoice guidelines).
    - Include separate expense reports for each individual contributor for whom expenses are included with the invoice.
    - Itemized Project Costs:
      - Cell phone, event charges, and/or other miscellaneous charges must be listed and described on invoice, if applicable.
      - Business meetings: All meals require itemized receipts (even if under $75), meeting agenda and list of attendees.
      - Itemized receipts required for charges over $75; or a brief explanation of purchase for charges under $75.
    - See “Reimbursable Expenses for Business-Related Travel” for additional reimbursement requirements.
• **Fixed Fee Contracts:**
  o Invoice amounts must match the payment schedule indicated in the Purchase Order, Exhibit A (Statement of Work), or as specified in the agreed upon payment schedule.

• **Hybrid Contracts:**
  o See “Time and Materials” and “Fixed Fee” instructions above.

**Reimbursable Expenses for Business-Related Travel**
NEEA will reimburse for work-related expenses as follows:

• **Receipts for all requested reimbursements must be organized in the order of appearance on invoice.**

• Requests for reimbursement over $75 must have detailed receipts and proof of purchase (i.e., detailed charge card receipt with last four digits of card number); or a brief explanation of purchase if the amount is under $75.

**Transportation**
  o **Airfare**: Detailed itinerary with proof of purchase.
  o **Train**: Detailed itinerary with proof of purchase.
  o **Car** (select one):
    ▪ **Mileage**: Calculate mileage reimbursement as published by the US General Services Administration at [www.gsa.gov/mie](http://www.gsa.gov/mie). For multiple mileage reimbursement claims, please provide a spreadsheet itemizing for each trip, who, when, where/why, miles claimed.
    ▪ **Car rental**: Rental and gas receipts.
  o **Parking**: Receipts.
  o **Taxi/Public Transportation**: Receipts.

**Lodging**
  o **Hotel**: Itemized receipts.
    ▪ Meals, internet and personal charges included on the lodging bills will not be reimbursed.
    ▪ We do not require the use of the US General Services Administration limits for lodging but do ask that Contractors consider accommodations competitive with the rates for that region.

**Meals**
  o Per diem reimbursement only - no receipts. Calculate per diem reimbursement as published by the US General Services Administration at [www.gsa.gov/mie](http://www.gsa.gov/mie).
  o The city/county used for calculating the per diem rate and the date the calculation was made must also be provided.

**Non-Reimbursable Expenses**
As a non-profit organization receiving Federal funding, NEEA is subject to the OMB Circular 2 CFR 200 and may not use any of our funding for the following categories of expenses:
  o Personal services such as valet services, travel booking fees, and "trip insurance".
  o Entertainment costs including amusement, social activities, or any associated costs.
  o Alcoholic beverages.
  o Meals or beverages for individuals not working on behalf of NEEA.
  o First class travel or business upgrades except in extreme cases with written preapproval.
  o Any costs not directly related to NEEA programs/projects.