**U.s. DEPARTMENT OF Energy**

**Federal Energy Management Program**

**ESPC ENABLE ESCO Evaluation guide and worksheetS**

November 2020, version 6.0

***PLEASE READ THIS GUIDE BEFORE USING THE EVALUATION WORKSHEET / CONSENSUS SHEET TEMPLATE***

**ESPC ENABLE ESCO Evaluation Guide**

**Introduction:** This tool is to be used by the ESPC ENABLE Evaluation Team to evaluate energy service company (ESCO) responses to the Request for Quote/Notice of Opportunity (NOO). In the NOO, the agency identified the criteria that would be used to select an ESCO from the responses received. It is recommended that the responses be no longer than 10 pages and follow the format prescribed in **02 NOO Attachment 2 – ESCO Expression of Interest Form**.

**Instructions:** Each member of the Evaluation Team should evaluate ESCO submissions using the agency’s proposal evaluation procedures. Suggested rating criteria and adjectival ratings are included below. The evaluation criteria***MUST*** *be compatible with the best value selection criteria described in the NOO.*

The Evaluation Team shall meet to review and discuss the submitted ESCO submissions. For each ESCO, the Evaluation Team will come to a consensus and fill out the attached form (**03** **Attachment 1 - ESCO Evaluation Worksheet/Consensus Sheet**) using the following procedures.

* For each ESCO, evaluate each criterion in the NOO.
* Briefly summarize for each ESCO the positives and negatives and indicate the appropriate evaluation rating adjective (value).
* For each positive and negative comment, cite the exact text from the proposal in the designated box in the Worksheet/Consensus Sheet (attached).
* Documented consistency in this form with the acquisition plan and the selection criteria in the NOO is of utmost importance.
* The Consensus Sheet is to be used when the evaluation team meets to compare strengths and weaknesses of ESCOs from the individual Worksheets.
* After discussion among the Evaluation Team, list the strengths and weaknesses of each ESCO in the Consensus Sheet.
* Evaluation Team Chairperson provides a recommendation to the Source Selection Official in a “Source Selection Decision” document, per agency policy.

Please note: the (Red Text) in **03 Attachment 1 - ESCO Evaluation Worksheet/Consensus Sheet** is explanatory text and should be removed prior to this worksheet. You should reformat this document to fit your agency’s formatting requirements for procurement documents.

**Suggested Evaluation Rating Values:** (in drop-down menus under the “Evaluation Value” column in theESCO Evaluation Worksheet/Consensus Sheet attached).

* **Significant Strength** —The Offeror demonstrates excellent understanding of requirements and approach and exceeds requirement. The Offeror has exceptional strengths and there are no significant weaknesses or deficiencies.
* **Strength—**The Offeror demonstrates a good understanding of requirements and approach.
* **Meets** —The Offeror meets requirement as stated in NOO.
* **Weakness** —The Offeror demonstrates some understanding of requirements; however, Offeror demonstrates a lack of performance or capability standards.
* **Significant Weakness** —The Offeror demonstrates a poor understanding of requirements and/or proposes an approach or response that does not meet requirements.
* **Unacceptable** — The Offeror fails to meet performance or capability standards and the requirements are not likely to be met. There are numerous weaknesses and deficiencies. The risk of unsuccessful performance is high.

IMPORTANT: *Ensure that none of the criteria used are in conflict with the original best value criteria in the NOO or otherwise conflict with federal or agency purchasing standards, rules, or regulations.*

# 03 attachment 1 - INDIVIDUAL ESCO EVALUATION WORKSHEET/Consensus SHEET

# (COMPLETE ONE Evaluation WORKSHEET PER ESCO SUBMISSION RECEIVED, followed by A team consensus sheet Per ESCO. The inserted text in the ESCO Qualifications section is for demonstration purposes ONLY. Please delete it before using this template.)

|  |  |
| --- | --- |
| **Date:** | Click here to enter a date. |
| **Agency name:** | Click here to enter text. |
| **Subagency:** | Click here to enter text. |
| **Project site/project name:** | Click here to enter text. |
| **Evaluator name:** | Click here to enter text. |
| **Interested ESCO:** | Click here to enter text. |

| **Best value criteria*****(check these against the NOO)*** | **Strengths** | **Weaknesses** | **Evaluation Value** |
| --- | --- | --- | --- |
| **Strengths (*include significant strength, strength, or meets*)** | **Reference to submission *(cite text)*** | **Weaknesses (*include weakness, significant weakness, or unacceptable*)** | **Reference to submission *(cite text)*** |
| ESCO Qualifications and Past Performance | XYZ ESCO has performed multiple performance contracts at facilities of similar size, with similar ECMs. | ESCO listed 3 projects on their submission that were <200,000 sq. ft. and only included basic lighting, water, and controls. | A majority of the ESCOs work has been performed on the East Coast and the facilities being considered for this project are in the Pacific-NW | ESCO did not list any projects at sites farther west than Illinois. | Choose an item. |
| Price Component | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
| Other 1 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
| Other 2 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |