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Guidance for Using ESCO Oral Presentations in ESPC Source Selection

Allowing ESCOs to make oral presentations as part of the source selection process can be an efficient way to handle down-selections. Oral presentations may substitute for or augment written information in the the source selection process (FAR 15.102), and can allow for greater communication between government and ESCO personnel. Presentations can be conducted using questions similar to a job interview, as a one-sided ESCO presentation, or as a combination of both.

The following guidance is not intended to replace or circumvent any existing agency-level guidance or regulation; the guidance is intended to enhance the agency’s effectiveness when interviewing potential ESCOs.

# Instructions

* Plan – The Agency Contracting Officer will take the lead:
	+ Who from the agency will participate? At a minimum, the chair of the source-evaluation board (SEB), voting members, and Contracting Officer must attend all presentations.
	+ Recommend that ESCO program manager, project designer, and actual key personnel who will perform at the agency site should be included. Limit ESCO participation to a reasonable number of individuals.
	+ Decide whether to have video conference, webinar, telephone conference, or face-to-face (recommended) presentation format.
	+ Set the location, date, and time for the presentations. Consider using a lottery to determine the sequence.
	+ Identify the topics that will be addressed.
	+ Determine the rules governing the types of presentation material and media that will be authorized.
* Be prepared
	+ Prepare questions in advance based on the Team’s comments and concerns to ensure that all ESCOs have the same opportunity to respond.
	+ Make the facility comfortable and accessible. Arrange building/site access in advance.
	+ Meet with the agency team in advance to ensure that all members are prepared, understand their roles, and understand the procedures to be followed.
	+ Plan to evaluate presentations shortly after they occur. It is recommended that evaluators caucus following each presentation or at the end of the day and summarize potential strengths and weaknesses, and verify perceptions and understandings.
* Be brief:
	+ Recommend scheduling 1-2 hours for each presentation. If using an interview method limit the number of questions to less than 20 to allow time for comprehensive responses.
* Be consistent:
	+ Prepare a set of discussion topics in advance. At a minimum they should address each contractor’s qualifications for implementing potential energy conservation measures.
		- Request specific detailed examples regarding similar projects, including the resulting energy savings.
		- Request an explanation of how similar projects relate to the scope and content of the task order concerned (copied from the National Defense Authorization Act of 2011).
	+ Exchanges between evaluators and presenters should be limited to ensure that they do not constitute discussions (as defined in FAR 15.306(d)).

Suggested Points For Discussion

1. How many energy audits/feasibility studies have been performed by the ESCO?
2. What are the unique aspects of each project?
3. Describe technical similarities between past projects and this project.
4. Describe the technical strengths of similar projects performed by the ESCO.
5. Describe the technical weakness of similar projects performed by the ESCO. Describe how the technical problems were addressed and resolved.
6. Describe the management approach for conducting an ESPC, including organizational structure, personnel, and incorporating subcontractors and small business concerns.