

r. 4-21-15



FEMP Suggested ESPC Milestone plan

Energy Savings Performance Contract (ESPC) procurement requires planning and management, and delays in ESPC awards result in forgone energy savings. Savings from DOE indefinite delivery/indefinite quantity (IDIQ) ESPC projects can be accumulated sooner through a timely award process. The DOE IDIQ provides two approaches to energy service company (ESCO) selection, depending on project requirements: Approach A allows a multi-step down selection based on qualifications (SBQ) prior to a Preliminary Assessment (PA) by one ESCO. Approach B requires a Preliminary Assessment from two or more interested ESCOs after evaluation and down selection of all interested ESCOs based on qualifications and further consideration. A longer schedule may be required for Energy Savings Agreements (ESAs) or other more technically complex projects.

**Milestones for ESPC Task Order Development to Award Process**

**Acquisition &**

**Project planning**

(30









1

2

3

4

5

7

6

8

9

10

11

12

1 to 2 months

.5

3 to 6 months

1 to 2 months

1.5 to 2 months

6

to

9

months

Months

**Best**

**-**

**Expedited**

**Schedule**

-

60 days)

Work w/FPE

Form

Acq

. Team

Request PF

**ESCO selection**

(90

-

180

days)



Notice of Opp.



Down selection (A or B)\*



Request further info and

schedule Discussion\*\*



Inform DOE &

Conduct PA(s)\*



Evaluate finalist(s)



Send NOITA

**TO**

**-**

**RFP**

(15

-

35 days)

**IGA & Final**

**Proposal**

(180

–

270 days

)

•

Energy baseline

development

•

M&V approach

•

Construction

approach

**Site/Agency**

**& GFO Review**

(

30

-

60 days

)

**Final Reviews,**

**Negotiations,**

**and Award**

(

45

-

60

days)

12.5

mos.

\*\* For a one

-

step down selection, include discussion

questions and further info as a reference in original NOO

and specify if discussion will be written or oral.

more thorough baseline

requires many months of

measurement

**Longer Schedule**

24

mos.

\*Approach A: Down select to one or more; Approach B: Down select to two or more

(In approach A, there will be only one ESCO performing a Preliminary Assessment)

Allow more time for highly complex

projects

(geographically spread

out sites

, multiple ESCO PAs, long

base line period, etc.)

## Approximate staffing needs for an ESPC procurement project

1. To award task order:
   1. Energy/facility manager: 2–5 full-time employee (FTE) months
   2. Contracting office: 1-3 FTE months
2. Construction, commissioning, and post-installation M&V and throughout life of contract:
   1. Mostly energy/facility manager  
      Time needed varies widely based on project complexity and site requirements
   2. Utilize typical agency construction/acceptance process
3. Contract administration through first-year M&V
   1. Approximately 1 FTE month

# The DOE detailed procurement Milestone tool

A sample DOE detailed procurement milestone tool is found on the next page, followed by instructions for using the tool and a completed sample of the tool.

## Sample DOE detailed procurement milestone tool

Right-click the figure below and select “Worksheet Object, Open” to work with this schedule in Microsoft Excel. Save the file as an Excel spreadsheet in an appropriate network folder.



## Blank Detailed Milestone Instructions

1. Right click the Microsoft Excel Object on the next page and select “Open.”
2. Once in Excel, save the file as an Excel worksheet in an appropriate network location.
3. Close the file and reopen in Excel from the network location where you just saved it.
4. Enter the start date of the project in cell D1 (colored in green); this date should be the same day you will request a Project Facilitator from your Federal Financing Specialist.
5. Do NOT edit the dates below row 3; they are automatically calculated based on the “min” and “max” timeframe you will enter into columns B and C (these cells are locked so that you cannot accidentally change them).
6. Worksheet cells with a small red marker in the upper right corner indicate helpful comments—hover over the red marker to see the comment.
7. Change the project steps text in column A (Activity) as needed to tailor the sheet to your project.
8. If you need to delete steps, delete the entire row so all formulas will still work correctly.
9. If you need to add steps:
   1. Add an entire new row.
   2. Select/highlight the row above as well as the new row and use the “Fill, down” command to copy the date formulas to the new row. Alternatively, you can copy the cells from the row above to the new row you have inserted.
   3. Change the non-date cells as needed.
10. To change the calendar day duration of the minimum or maximum calendar days to complete an activity, edit the number in column B and/or C (Min or Max). This will automatically change the end date for the task.
11. The responsibility matrix for the activities is found in columns I through O. Edit this as necessary if it will help you communicate roles to the team members.

The worksheet is protected so that you will not accidentally edit calculated cells. If you would like to edit these cells then unprotect the sheet using the “Review” tab and selecting “unprotect”. There is no password required.

## Example, Completed Detailed DOE ESPC Procurement Milestone (Excel Tool)

