**PA SOW – Template**

The following Statement of Work (SOW) for the PA was developed from an actual project that included multiple buildings and agency-identified ECMs for each building which the agency described succinctly in a table. The PA was effectively used to identify a series of projects to be implemented over time.

Some agencies, depending on project size and scope, will not require a PA or need to refer to this template, but will alternatively use an in-house assessment for the initial project scope, and/or skip the PA and start with an IGA.

**PA SOW  
Template**

**1.0 PURPOSE, SCOPE, AND GOALS**

**1.1 PURPOSE** — The Work to be performed consists of completing an assessment of buildings and facilities located at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_ to identify ECMs and provide sufficient detail for each ECM to determine which are candidates for an IGA and potentially installed as part of a UESC.

**1.2 SCOPE** — An assessment shall be conducted for the *facilities/buildings/systems* identified in *Exhibit A and Table 1*. The description of these *facilities/buildings/systems* may be adjusted to include additional items that are discovered during the site investigation and that could result in energy or water savings or associated cost savings. The assessment shall comply with requirements of 42 USC 8253 (f).

**1.3 GOALS** — The following are the primary goals for ECMs identified from this assessment.

* ECMs and projects shall be in the best interest of the *government/agency/mission* and ranked based on *need/facility and reliability improvements/economics*.
* Meeting the previous point, incentives, reduction in consumption, and cost savings will be maximized.
* Impacts to personnel and increased maintenance requirements will be minimized.
* ECMs will be logically combined into larger projects to improve project costs.

**2.0 SITE ADDRESSES & POINTS OF CONTACT**

**Utility Company Name:**

* Utility Representative, including Address, Phone Number, and E-mail Address
* Second Utility Representative, including Address, Phone Number, and E-mail Address

**Agency Point of Contact:**

* Agency Representative, including Address, Phone Number, and E-mail Address
* Second Agency Representative, including Address, Phone Number, and E-mail Address

**3.0 GENERAL REQUIREMENTS**

**3.1 DEFINITION OF TERMS**

Contractor — The entity or entities authorized by \_\_\_\_\_\_\_\_\_\_\_ to perform Work under this Agreement, such entities shall include (Utility company name), and any subcontractors (\_\_\_) retained to perform the Work described in this Agreement.

Cost effective, also LCC Effective and Financed LCC Effective — Providing a savings to investment ration (SIR) greater than *for example 1 or 1.25 insert agency determination*, as calculated using the methods and procedures developed pursuant to 10 CFR 436, Federal Energy Management and Planning Programs, Subpart A, Methodology and Procedures for LCC Analyses.

PA — A survey of a building or facility and surrounding areas that provides sufficiently detailed information to identify all potential energy and water conservation measures with a life-cycle cost-effective payback period.

ECM — A potential energy or water conservation measure that is identified during the survey.

Maintenance — Maintenance refers to all efforts, by all sources, to maintain completed ECMs. The economic analysis of maintenance costs associated with an ECM must include a comparison of ongoing maintenance costs and the potential repair/replacement costs avoided with adequate maintenance. Data about maintenance will be provided by the Agency.

Savings-to-Investment Ratio (SIR) — The net present value of project savings stream divided by the project cost using discount factors from the *Energy Price Indices and Discount Factors for Life-Cycle Cost Analysis – April 2008. Annual Supplement to National Institute of Standards and Technology (NIST) Handbook 135 and NBS Special Publication 709, U.S. Department of Commerce.* <http://fire.nist.gov/bfrlpubs/build08/PDF/b08019.pdf>

Simple Payback Period — The ratio of the estimated project cost divided by the estimated savings per year from implementing the ECM.

**3.2 Assessment Team** — shall have the following minimum experience and qualifications:

Principal:

* Minimum of four (4) years of experience in accomplishing surveys
* Minimum of Bachelor’s degree in Engineering from a college or university accredited by the Engineers Council for Professional Development
* Professional Registration as an Engineer in the State of \_\_\_\_\_\_\_\_\_\_

Assessment Supervisor: (Per 10 CFR Ch. II, Section 450.22)

* Minimum of four (4) years of experience in accomplishing surveys
* Minimum of Bachelor’s degree in Engineering from a college or university accredited by the Engineers Council for Professional Development

Assessment Team Members:

* Minimum of two (2) years of experience in accomplishing surveys

**4.0 APPLICABLE SPECIFICATIONS, REGULATIONS, ETC.**

ECMs shall meet or exceed all applicable codes and regulations, including, and not limited to:

* National Electrical Code (NEC)
* Uniform Building Code (UBC)
* Uniform Mechanical Code (UMC)
* Uniform Plumbing Code (UPC)
* National Fire Protection Association (NFPA) Standards
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Clean Air Act and Amendments, Title VI
* (State) Code of Regulations

**5.0 POTENTIAL ENERGY AND WATER CONSERVATION MEASURES** — Potential water conservation measures and ECMs including commissioning and renewable energy system opportunities shall be evaluated for each building, structure, or area surveyed at the *Site/Location* in order to develop potential ECMs.

**5.1 POTENTIAL ECMs** — A list of agency-identified and generally acceptable ECMs are described below *(e.g., in Table 1 – Agency Identified ECMs and Table 2 – General List of ECMs, and in Section 5.2)*. It is anticipated that the Utility will assess the agency-identified ECMs along with other ECMs identified during the assessment. The Utility will provide results of the assessment in a spreadsheet format such as *(Table 3 – insert sample table)* showing technology applicability to all buildings and structures.

**5.2 RECOMMENDATIONS FOR CHANGES IN OPERATIONAL AND MAINTENANCE PROCEDURES**

It is understood that substantial energy and water savings can be obtained by changes in operational procedures. In each area or building where substantial energy or water is consumed, provide recommendations for improving efficiency through operational strategies that will not cause risk to mission or operational requirements including:

* Changes to operational hours for specific equipment or systems, e.g., minimize electrical consumption and demand charges through night/off-peak run time for heavy process loads.
* Changes in procedures and/or working hours having little or no impact on personnel.
* Changes to existing maintenance procedures, e.g., group lamp replacement, replace failed motors with premium efficiency motors, etc.
* Modifications to existing facility use, e.g., maximizing occupancy, etc.