

UESC New Utility Toolkit Overview and Getting Started

New Utility Toolkit

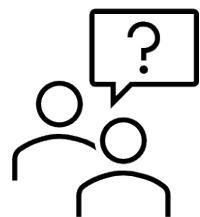
June 25th 2021



- **Help utilities establish new UESC programs for federal customers**
- **Provide guidance for utilities implementing new UESC programs**
- **Share best practices for successful UESC programs**

Launching a new UESC program

Planning

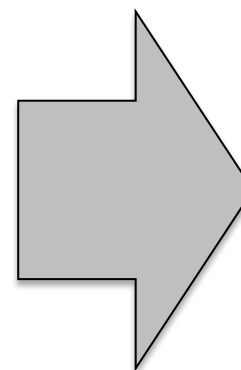
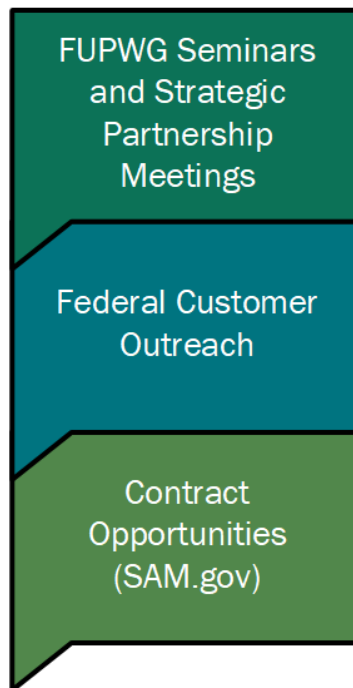


Utility Stakeholders

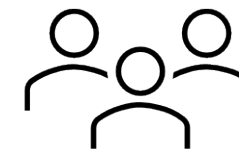
Development



Marketing



UESC Implementation



Agency Customers

Market Potential
and FEMP Data
Resources



Implementation
Model Guidance



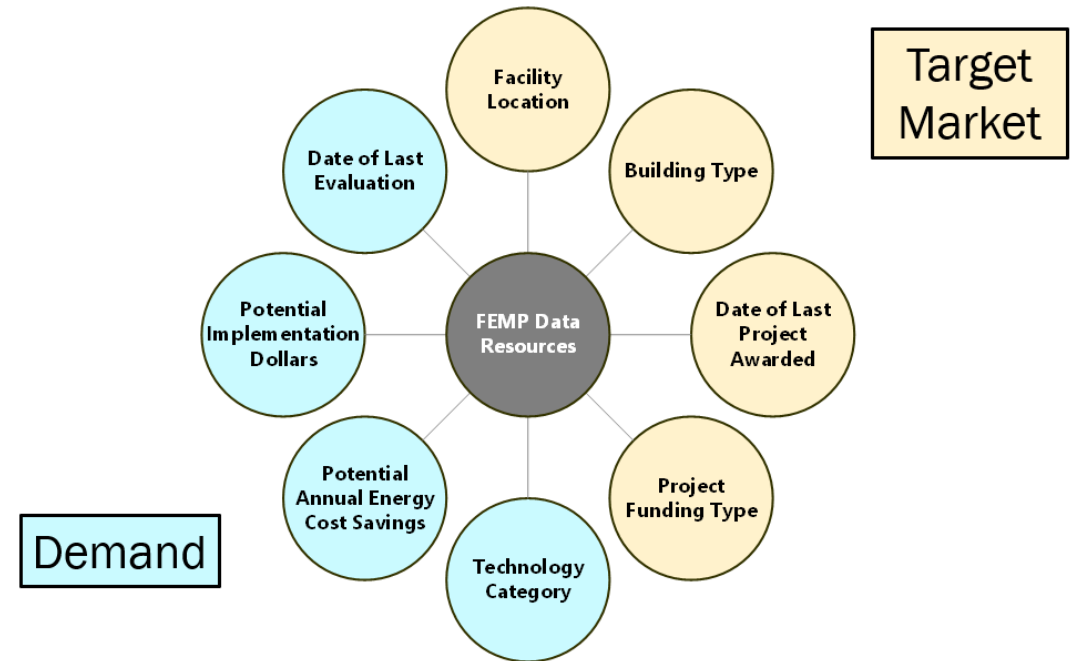
Financing
Guidance



Tools and Templates
Overview



- Make the case for providing UESCs in your service territory
- Access FEMP data resources
- View examples of federal customer data
- Apply data resources for market analysis



- Identify internal resources needed for implementing UESCs
- Understand the role of subcontractors
- Evaluate ESCO partners
- Select a contracting option



Utility
Self-Performs

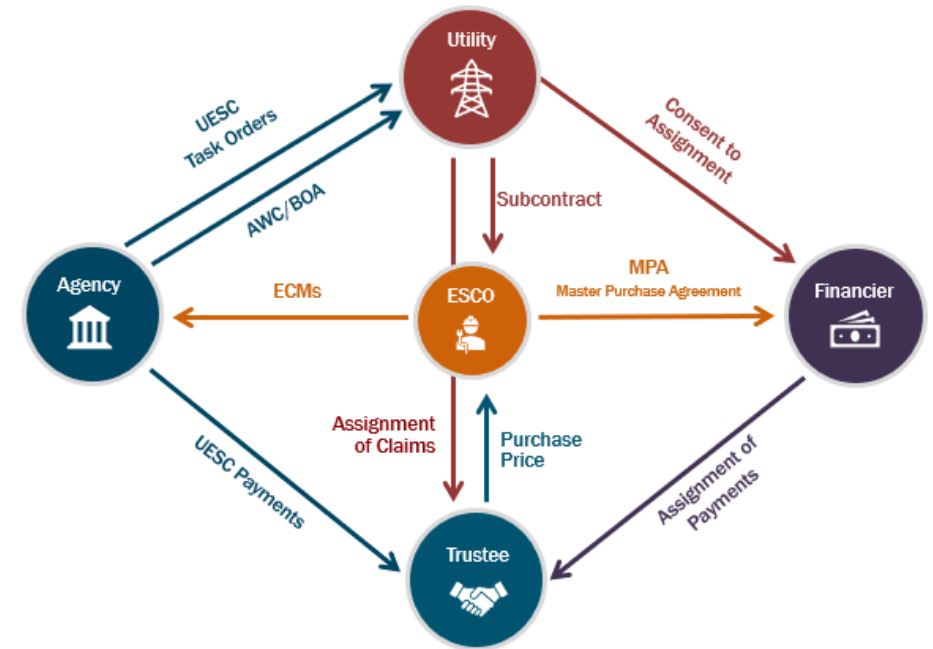


Utility with Single
ESCO Partner

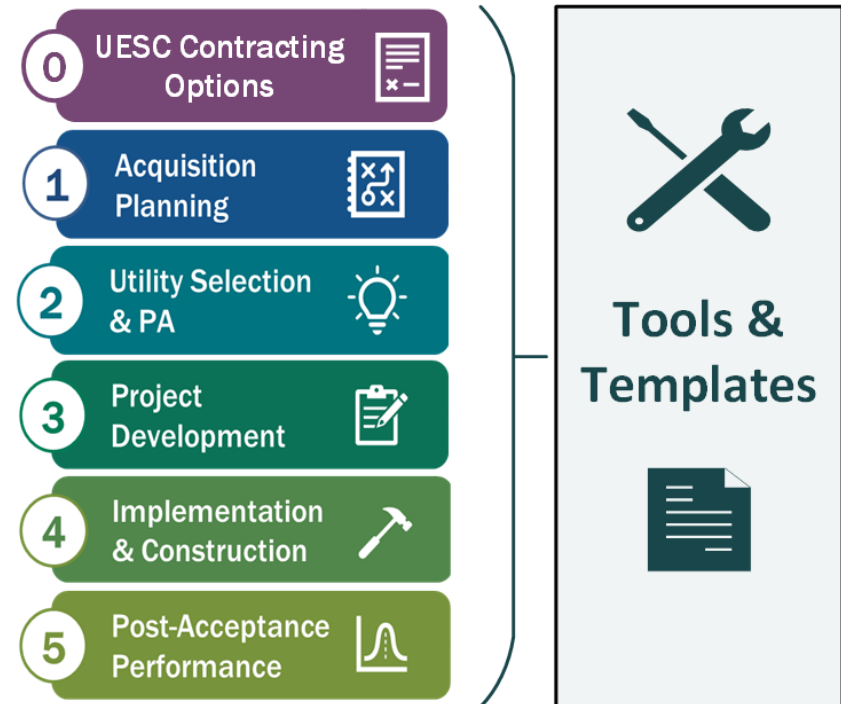


Utility with Multiple
ESCO Partners
(one ESCO per project)

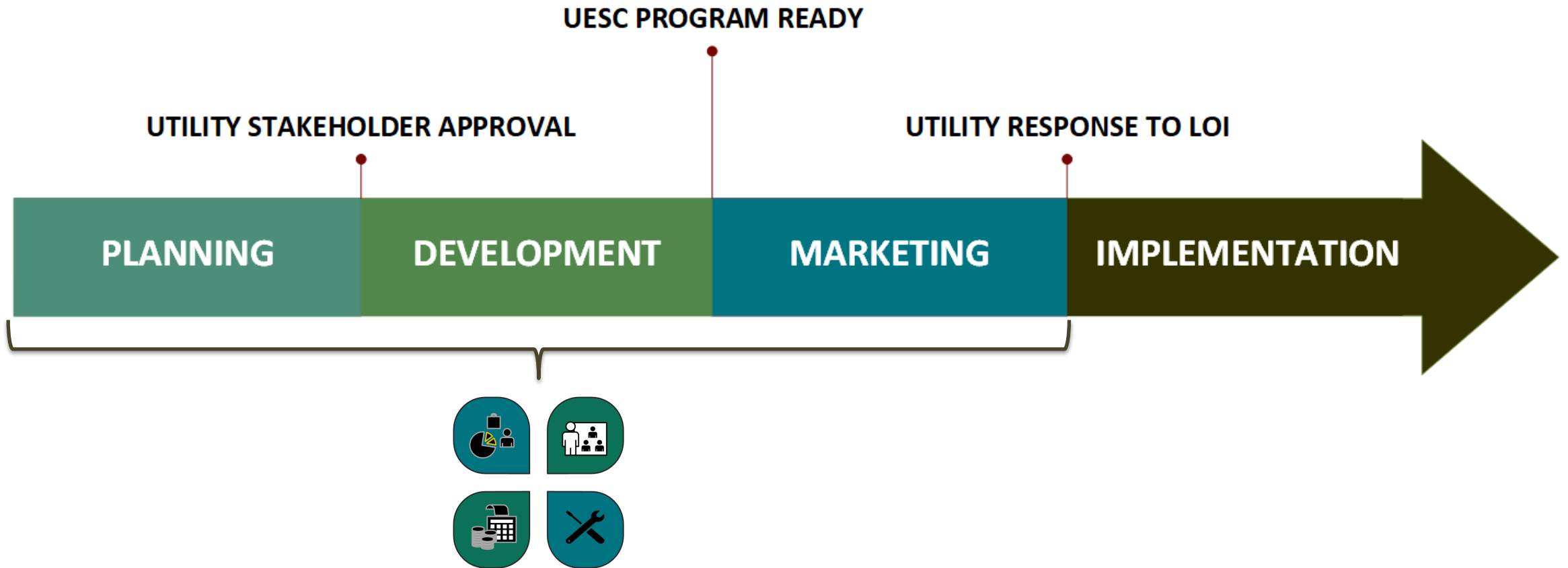
- Understand the financing structure for UESCs
- Determine contracting relationships with ESCOs and finance companies
- Minimize factors that increase interest premiums
- Administer competitive financing RFPs



- Utilize FEMP resources to establish contract documents
- Navigate FEMP templates for UESC utility deliverables
- Prepare for utility role in UESC Implementation Process



Timeline for establishing a new UESC program



Agency

- Streamlines contracting with established source
- Appropriate for a wide range of projects and facilities, including leased space
- Governing body ensures oversight of utility program offering
- Ability to leverage incentives and financing
- Provides opportunity to take advantage of utility expertise

Utility

- Manage load by lowering demand
- Delay or eliminate need for new generation
- Meet state energy and renewable portfolio standards
- Identify new opportunities to provide energy management services to federal customers
- Demonstrate expertise and capabilities to help federal customers meet current and future energy goals

Market Potential

- Assess your service territory for market potential
 - EISA evaluations
 - Investment by funding type
 - Federal customer load profiles
 - PUC requirements
 - Customer goals
 - Utility goals

Internal Resources

- Identify internal resources to implement a UESC program
 - Utility account representative
 - Program administrators
 - Contracting
 - Legal

- **Select an implementation model that fits your organization**
 - Evaluate potential subcontracting or ESCO partnerships for UESC work:
 - Engineering & Design
 - Financing
 - Project Management & Construction
 - Performance Period Services
- **Choose a contracting option**
 - Number of federal customers and agencies
 - Potential UESC project volume
 - Agency requirements

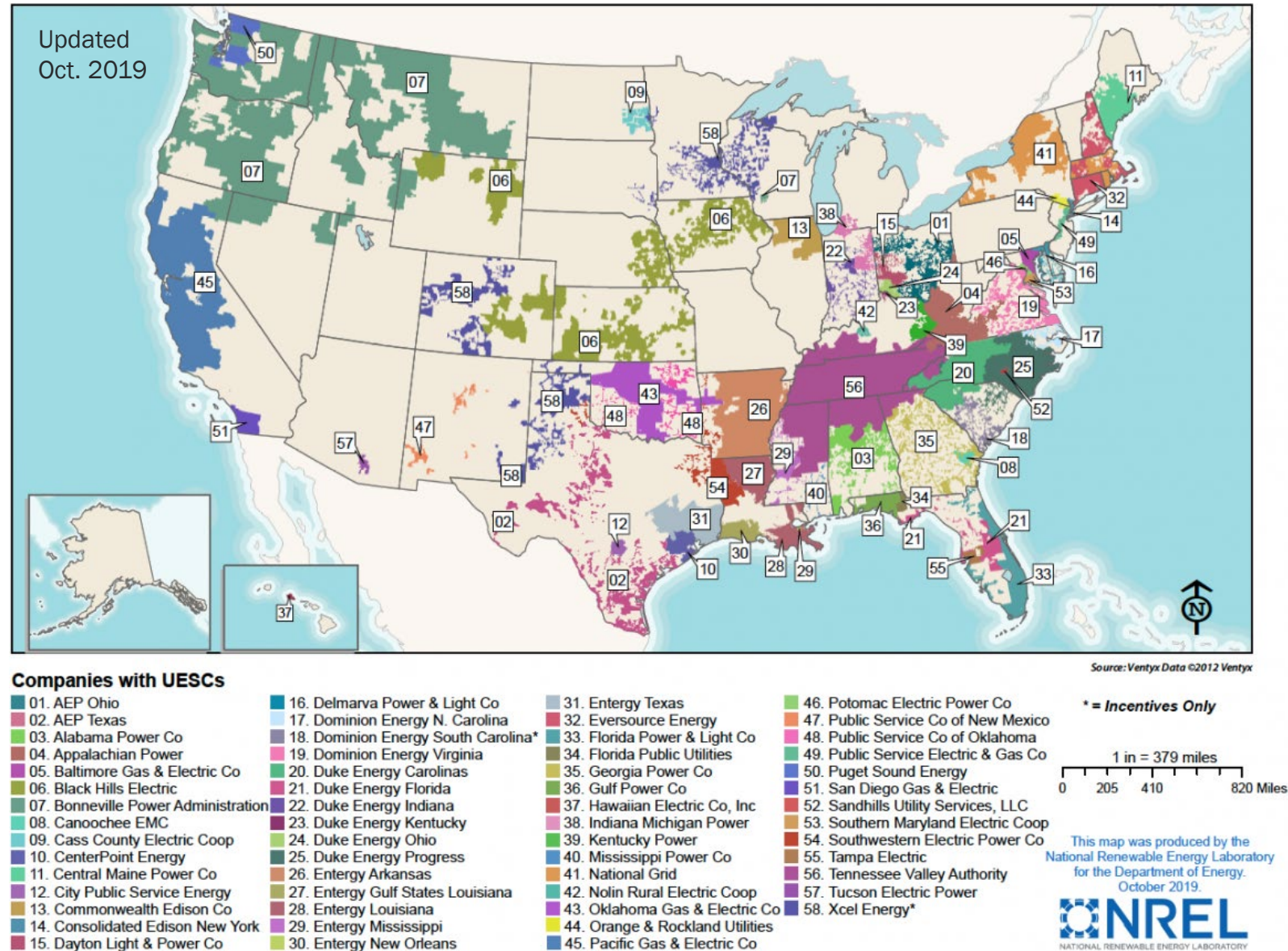
- **The utility is responsible for finance sourcing in UESCs**
 - Understand the process and contract documents for finance bidding
- **Prepare stakeholders for utility role in UESC financing**
 - Contracting
 - Legal
 - Accounting
 - Finance & Treasury

- **Attend FEMP UESC Training**
- **Develop contract documents for review**
 - Leverage FEMP resources, sample documents, and templates
 - Review contracting requirements with utility stakeholders
- **Understand UESC implementation process and deliverables**
 - FAR regulations
 - Pre-award activities
 - Task Orders
 - Performance period services

- **Federal Utility Partnership Working Group (FUPWG)**
 - Join FUPWG and get listed on the FEMP website as a participating utility
- **Strategic Partnership Meetings (SPM)**
 - Ask FEMP to facilitate a SPM in your service territory
 - Meet with federal customers and market your UESC offering
- **Federal Customer Outreach**
 - Leverage your federal account representatives to highlight the UESC program
- **Monitor System for Awards Management (SAM.gov)**
 - Posted contract opportunities

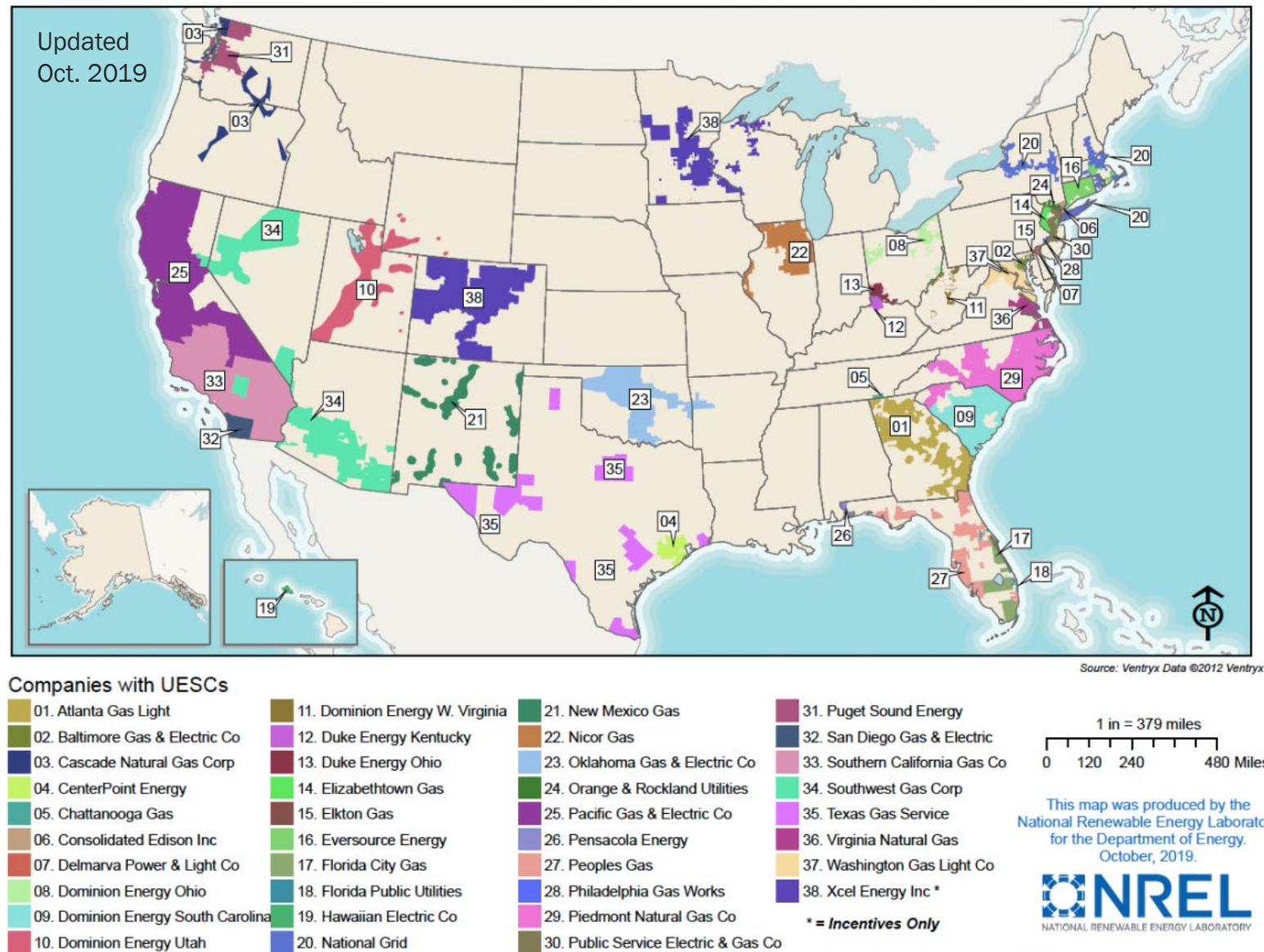
Utilities Offering UESCs – Electric

Marketing



Utilities Offering UESCs – Natural Gas

Marketing



- **UESC Comprehensive Training**
 - Learn about all 5 steps of the UESC implementation process
- **Attend FUPWG**
- **Register for other topic-specific trainings that impact your UESC**
- **FEMP Training Catalog**
 - <https://www7.eere.energy.gov/femp/training/>

- 1. Establishing a UESC program will involve internal resources**
 - Provide your stakeholders with an expectation
 - [UESC Implementation Model Guidance](#)
- 2. The utility is responsible for finance sourcing in UESCs**
 - Understand the process and contract documents for finance bidding
 - [UESC Financing Guidance](#)
- 3. Develop contract documents for review**
 - Leverage FEMP resources, sample documents, and templates
 - [Tools & Templates Overview](#)
- 4. Is there demand for UESCs in your service territory?**
 - Assess your service territory market potential
 - [UESC Market Potential and FEMP Data Resources](#)