

UESC Utility Tools & Templates Overview

New Utility Toolkit

June 25th 2021





Introduction

- The UESC Tools & Templates Overview follows the UESC Implementation Process
- The linked resources are covered in-depth during FEMP UESC Training and Technical Assistance
- The tools and templates are reference materials for FEMP best practices
- Agency-specific or location standards may apply

How to use this overview

- Each phase of the *UESC Implementation Process* involves a collaboration between federal customers and utilities
- This overview focuses on UESC deliverables that are either required of the utility or examples of key contract documents
- Below each process step is a series of linked resources and templates that may be referenced for FEMP best practices

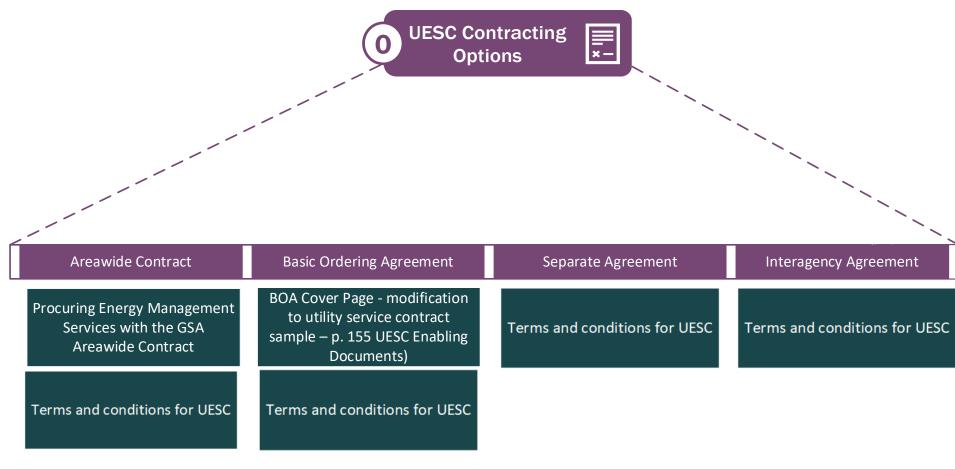
Key Resources

- The Utility Tools & Templates Overview navigates directly to the FEMP online resources
- These resources are available through FEMP training, technical assistance, and the FEMP website
- Key Resource Links to the full FEMP content are at the end of the overview

Acronyms & Definitions

- FUPWG Federal Utility Partnership Working Group
- SPM Strategic Partnership Meeting
- TO Task Order
- ePB eProject Builder
- IGA Investment Grade Audit
- PA Preliminary Assessment
- **ECM** Energy Conservation Measure
- M&V Measurement & Verification
- SOW Scope of Work
- **RFQ** Request for Qualifications
- **BOA Basic Ordering Agreement**

UESC Contracting Options – (pre-implementation)













Project Development





Implementation & Construction



Post-Acceptance Performance



Initial SOW Acquisition Strategy **Letter of Interest**

Utility Selection Evaluation Factors

Preliminary Assessment

Investment Grade Audit

TO for Design & Installation

Performance Assurance Plan

Project Award

Final Design and Installation

Commissioning & Performance Verification

Staff Training

Acceptance

Invoicing & Payments

Operation & Maintenance

Recommissioning

Utility Rep Outreach

FUPWG Seminars

Strategic Partnership Meeting

Letter of Interest Template

Utility Selection Evaluation Factors Sample

Preliminary Assessment SÓW

IGA SOW Template

Master Agreement Template

TO Sample

ePB UESC Financial Schedules

Perf. Assurance Template

Project Award Sample

TO Sample

Start-Up Verification

ECM Perf Verification Checklist

Perf. Assurance Training Format

Letter of Acceptance Template

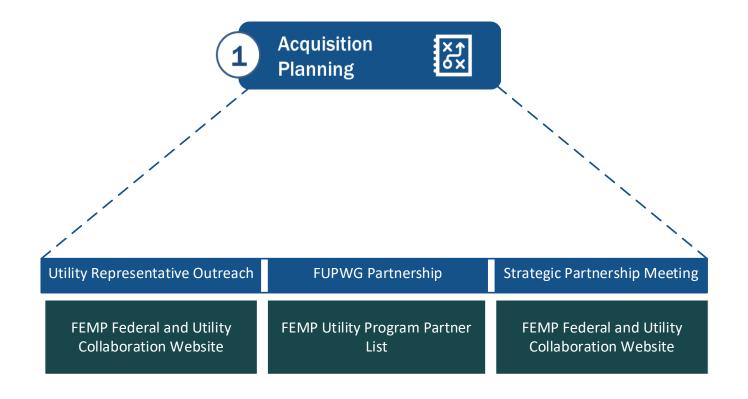
Guidance

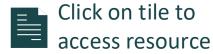
UESC Sample Invoice

Performance Assurance Plan – Report Format

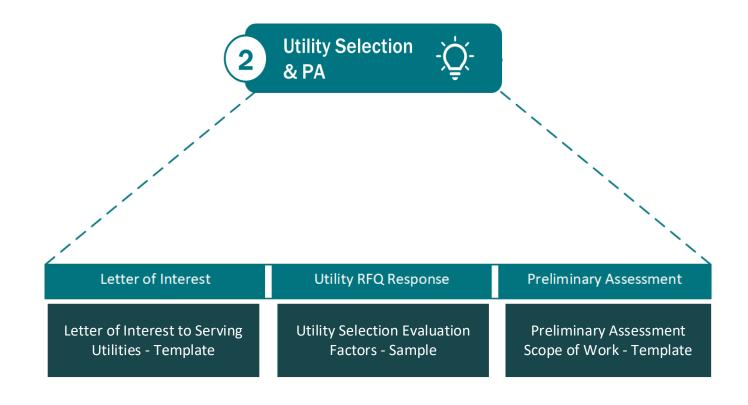
ePB M&V Plan

Acquisition Planning



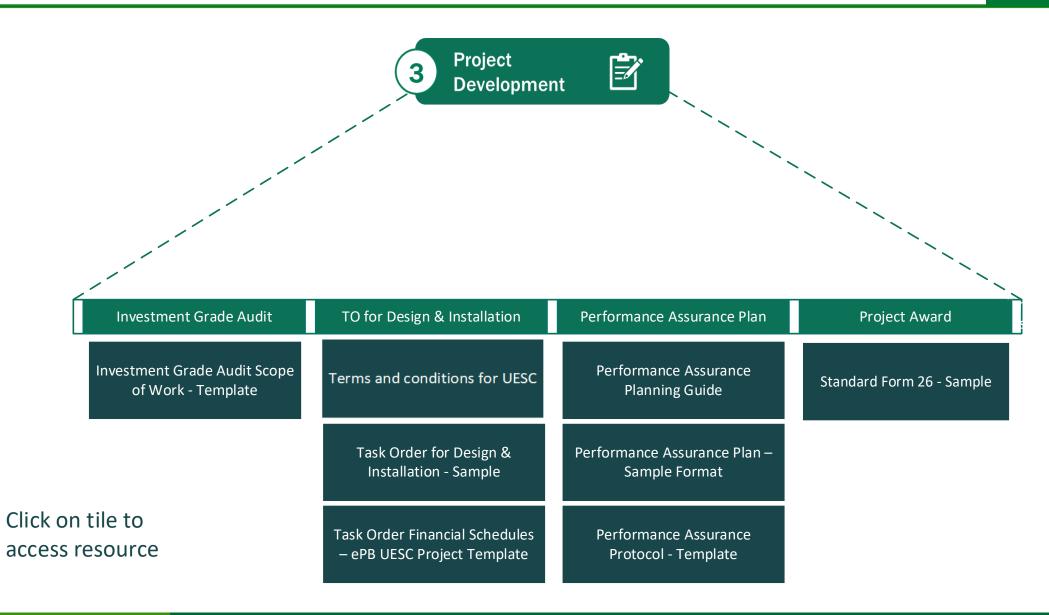


Utility Selection & Preliminary Assessment

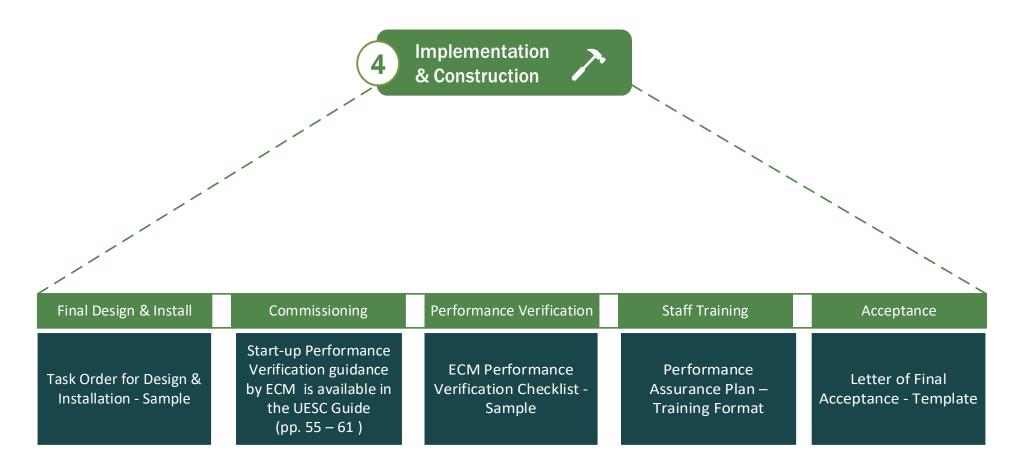


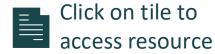


Project Development

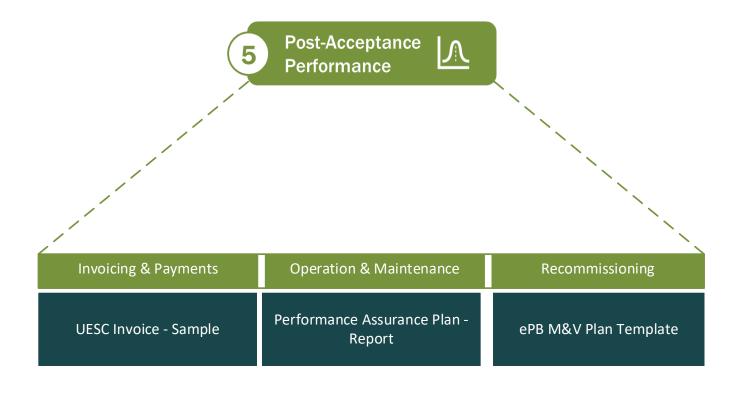


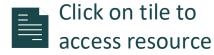
Implementation & Construction





Post Acceptance Performance





Key Resource Links



Resources for Implementing Federal Utility Energy Service Contracts Website

• https://www.energy.gov/eere/femp/resources-implementing-federal-utility-energy-service-contracts



UESC Guide

• https://www.energy.gov/eere/femp/downloads/utility-energy-services-contracts-guide-0



Utility Energy Service Contracts: Enabling Documents

• https://www.energy.gov/eere/femp/downloads/utility-energy-service-contracts-enabling-documents



Performance Assurance Planning Guidelines

 https://www.energy.gov/eere/femp/downloads/performance-assuranceplanning