UESC Utility Tools & Templates Overview

New Utility Toolkit

June 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

- Areawide Contract
- Basic Ordering Agreement
- Separate Agreement
- Interagency Agreement

- Procuring Energy Management Services with the GSA Areawide Contract
- BOA Cover Page - modification to utility service contract sample – p. 155 UESC Enabling Documents)
- Terms and conditions for UESC
- Terms and conditions for UESC

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UESC Implementation Process

Tools & Templates

1. Acquisition Planning
   - Initial SOW Acquisition Strategy
     - Utility Rep Outreach
     - FUPWG Seminars
     - Strategic Partnership Meeting

2. Utility Selection & PA
   - Letter of Interest
   - Utility Selection Evaluation Factors Sample
   - Preliminary Assessment SOW

3. Project Development
   - Investment Grade Audit
   - Letter of Interest Template
   - Utility Selection Evaluation Factors Sample
   - Preliminary Assessment SOW
   - TO Sample
   - ePB UESC Financial Schedules
   - Perf. Assurance Template
   - Project Award Sample

4. Implementation & Construction
   - Final Design and Installation
   - Master Agreement Template
   - TO Sample
   - Start-Up Verification Guidance
   - ECM Perf. Verification Checklist
   - Perf. Assurance Training Format
   - Letter of Acceptance Template

5. Post-Acceptance Performance
   - Invoicing & Payments
   - Operation & Maintenance
   - Recommissioning
   - UESC Sample Invoice
   - Performance Assurance Plan – Report Format
   - ePB M&V Plan

Tools & Templates
Acquisition Planning

1. Acquisition Planning

- Utility Representative Outreach
- FUPWG Partnership
- Strategic Partnership Meeting

- FEMP Federal and Utility Collaboration Website
- FEMP Utility Program Partner List
- FEMP Federal and Utility Collaboration Website

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Utility Selection & PA

2. Utility Selection & PA

- Letter of Interest
  - Letter of Interest to Serving Utilities - Template
- Utility RFQ Response
  - Utility Selection Evaluation Factors - Sample
- Preliminary Assessment
  - Preliminary Assessment Scope of Work - Template

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Project Development

3. Project Development

Investment Grade Audit
- Investment Grade Audit Scope of Work - Template

TO for Design & Installation
- Terms and conditions for UESC
- Task Order for Design & Installation - Sample
- Task Order Financial Schedules – ePB UESC Project Template

Performance Assurance Plan
- Performance Assurance Planning Guide
- Performance Assurance Plan – Sample Format
- Performance Assurance Protocol - Template

Project Award
- Standard Form 26 - Sample

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Implementation & Construction

4. Implementation & Construction

- Final Design & Install
  - Task Order for Design & Installation - Sample

- Commissioning
  - Start-up Performance Verification guidance by ECM is available in the UESC Guide (pp. 55 – 61)

- Performance Verification
  - ECM Performance Verification Checklist - Sample

- Staff Training
  - Performance Assurance Plan – Training Format

- Acceptance
  - Letter of Final Acceptance - Template

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Post Acceptance Performance

Tools & Templates

Post-Acceptance Performance

Invoicing & Payments
- UESC Invoice - Sample

Operation & Maintenance
- Performance Assurance Plan - Report

Recommissioning
- ePB M&V Plan Template

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Key Resource Links

- Resources for Implementing Federal Utility Energy Service Contracts Website
- UESC Guide
- Utility Energy Service Contracts: Enabling Documents
- Performance Assurance Planning Guidelines