

ESPC Training by Work Function

| | WORK FUNCTION | | | | | | | |
|---|---------------------------|-------------------------------------|--|----------------------------------|------------------------|-------------------------------|--|--|
| TRAINING | General/Pre- requisite | Contracting Officer and Legal | Contracting Officer's Representative | Facilities and Engineering | Project Facilitator | Energy Services Company | | |
| Overview | | | | | | | | |
| ESPC Five Phases to Success ¹ | X | Х | | | | Х | | |
| Introductory | | | | | | | | |
| ESPC Comprehensive Training: Phases 1 and 2 | | Х | Х | х | Х | Х | | |
| ESPC Comprehensive Training: Phase 3 | | Х | Х | х | Х | Х | | |
| ESPC Comprehensive Training; Phases 4 and 5* | | Х | Х | х | Х | Х | | |
| Monitoring-based Commissioning in Performance Contracting | | | Х | х | | Х | | |
| Using Task Order Schedules in eProject Builder (ePB) | | | Х | Х | | | | |
| Intermediate | | | | | | | | |
| Financing and Financial Proposal Review | | Х | Х | | | | | |
| Pricing in ESPCs | | Х | Х | х | Х | | | |
| Decarbonization Considerations: Performance Contracting | | | Х | х | Х | Х | | |

¹ Purpose of course is for executive/high-level overview and as a pre-requisite for intermediate/advanced courses.

^{*} Indicates emphasis on the performance period.



| | WORK FUNCTION | | | | | | | |
|--|---------------|-------------|----------------|-------------|-------------|----------|--|--|
| TRAINING | General/Pre- | Contracting | Contracting | Facilities | Project | Energy | | |
| | requisite | Officer and | Officer's | and | Facilitator | Services | | |
| | | Legal | Representative | Engineering | | Company | | |
| Just in Time ESPC Webinars Session 1: Managing Your | | Х | X | | | | | |
| Investment-Grade Audit | | | | | | | | |
| Just in Time ESPC Webinars Session 2: The Critical Path to Success | | х | Х | | | | | |
| Just in Time ESPC Webinars Session 3: Crossing the Finish Line to | | Х | Х | | | | | |
| Award | | | | | | | | |
| Just in Time ESPC Webinars Session 4: ESPC | | Х | Х | | | | | |
| Implementation/Construction Period - Not Your Conventional | | | | | | | | |
| Design, Build | | | | | | | | |
| Just in Time ESPC Webinars Session 5: Ensuring ESPC Project | | Х | Х | | | | | |
| Performance after Acceptance* | | | | | | | | |
| Reviewing Your Technical Proposal | | | Х | Х | Х | | | |
| Advanced Measurement and Verification for ESPCs | | | Х | Х | Х | | | |
| Long-term Management of Measurement and Verification* | | | Х | х | | Х | | |
| Project Facilitator Fundamentals | | | | | Х | | | |
| Advanced | | | | | | | | |
| Realizing the Potential of Underutilized ECMs in ESPC | | | Х | Х | | Х | | |

* Indicates emphasis on the performance period.