**U.s. DEPARTMENT OF Energy**

**Federal Energy Management Program**

**ESPC ENABLE ESCO Evaluation guide and worksheet**

OCTOBER 2014, version 5.0

***PLEASE READ THIS GUIDE BEFORE USING THE ACQUISITION PLAN TEMPLATE***

**ESPC ENABLE ESCO Evaluation Guide**

**Introduction:** This tool is to be used by the ESPC ENABLE Acquisition Team to evaluate energy service company (ESCO) responses to the Request for Quote/Notice of Opportunity (NOO). In the NOO, the agency identified the criteria that would be used to select an ESCO from the responses received. The responses should be no longer than 10 pages and follow the format prescribed in **02 NOO Attachment 2 – ESCO Expression of Interest Form**.

**Instructions:** Each member of the Acquisition Team should evaluate ESCO submissions using the agency’s proposal evaluation procedures. Suggested rating criteria and adjectival ratings are included below. The evaluation criteria***MUST*** *be compatible with the best value selection criteria described in the NOO.*

The Acquisition Team shall meet to review and discuss the submitted ESCO submissions. For each ESCO, the Acquisition Team will come to come to a consensus and fill out the attached form (**03** **Attachment 1 - ESCO Evaluation Worksheet**) using the following procedures.

* For each ESCO, evaluate each criterion in the NOO.
* Briefly summarize for each ESCO the positives and negatives and indicate the appropriate evaluation rating adjective (value).
* For each positive and negative comment, cite the exact text from the proposal in the designated box in the Worksheet (attached).
* Documented consistency in this form with the acquisition plan and the selection criteria in the NOO is of utmost importance.

Please note: the (Red Text) in **03 Attachment 1 - ESCO Evaluation Worksheet** is explanatory text and should be removed prior to this worksheet. You should be sure to reformat this document to fit your particular agency’s formatting requirements for procurement documents.

**Suggested Evaluation Rating Values:** (in drop-down menus under the “Evaluation Value” column in theESCO Evaluation Worksheet attached).

* **Significant Strength**—The Offeror demonstrates excellent understanding of requirements and approach and meets or exceeds requirement. The Offeror has exceptional strengths and there are no significant weaknesses or deficiencies.
* **Significant Weakness**—The Offeror demonstrates a suboptimal understanding of requirements and/or proposes an approach or response that does not meet requirements.
* **Unacceptable** — The Offeror fails to meet performance or capability standards and the requirements are not likely to be met. There are numerous weaknesses and deficiencies. The risk of unsuccessful performance is high.

IMPORTANT: *Ensure that none of the criteria used are in conflict with the original best value criteria in the NOO or otherwise conflict with Federal or agency purchasing standards, rules, or regulations.*

# 03 attachment 1 - ESCO EVALUATION WORKSHEET

# (COMPLETE ONE WORKSHEET PER ESCO SUBMISSION RECEIVED. The inserted text in the ESCO Qualifications section is just for demonstration purposes. Please delete it before using this template.)

|  |  |
| --- | --- |
| **Date:** | Click here to enter a date. |
| **Agency name:** | Click here to enter text. |
| **Subagency:** | Click here to enter text. |
| **Project site/project name:** | Click here to enter text. |
| **Evaluator name:** | Click here to enter text. |
| **Interested ESCO:** | Click here to enter text. |

| **Best value criteria****(check these against the NOO)** | **Strengths** | **Weaknesses** | **Evaluation Value** |
| --- | --- | --- | --- |
| **Strengths** | **Reference to submission (cite text)** | **Weaknesses** | **Reference to submission (cite text)** |
| ESCO Qualifications and Past Performance | XYZ ESCO has performed multiple performance contracts at facilities of similar size, with similar ECMs. | ESCO listed 3 projects on their submission that were <200,000 sq. ft. and only included basic lighting, water, and controls. | A majority of the ESCOs work has been performed on the East Coast and the facilities being considered for this project are in the Pacific-NW | ESCO did not list any projects at sites farther west than Illinois. | Choose an item. |
| Price Component | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
| Other 1 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
| Other 2 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |
|  | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter text. | Choose an item. |