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*Preliminary Assessment (PA) Review Template*

ESPC Process Doc. P2-10

Rev. 05-07-18

Responsibility: Agency & PF

## Preliminary Assessment Review TEMPLATE FOR ESPC Projects

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| **Area Reviewed** | **Notes/Comments** | **Assessment1** |
| * **Contract Requirements Met:**

 **(see Section H.4 of DOE ESPC IDIQ)** |  |  |
| * **Energy Conservation Measures**
 |  |  |
| *List each ECM2 identified in the Preliminary Assessment. Make review comments as to whether each is reasonable, acceptable, and in line with agency needs. At bottom, is overall package of ECMs comprehensive and does it provide a robust solution toward the agency’s energy reduction goals and other needs?* | Recommended ECMs:ECM 1:ECM 2: *(add more ECMs as needed)*Potential ECMs:ECM 1:ECM 2: *(add more ECMs as needed)*Overall: |  |
| * **RRPM3 Financial Factors:**
 | Review and assess: |  |
| * **RRPM Operational Factors:**
 | Review and assess: |  |
| * **RRPM Performance Factors:**
 | Review and assess: |  |
| * **Management Approach:**
 | Review and assess: |  |
| * **M&V4 Options/Approaches**
 | Review and assess: |  |
| *Identify the M&V option for each of the ECMs and determine whether the offered strategy is appropriate for the ECM and whether the M&V option costs reflect a reasonable balance between cost and savings uncertainty.* | ECM 1 M&V Option:ECM 2 M&V Option:ECM 3 M&V Option:ECM 4 M&V Option: *(add more ECMs as needed)* |  |
| * **TO5 Schedules**
 |  |  |
| *Are payments less than guaranteed savings? Is contract within required term? Note other terms & conditions or areas requiring discussion.*  |  |  |

*1 A – Acceptable, M – Minimal changes needed, S – Significant changes required*

*2 Energy Conservation Measure; 3 Risk, Responsibility, and Performance Matrix; 4 M&V – Measurement and Verification; 5 TO - Task Order*