**U.s. Department of Energy**

**Federal Energy Management Program**

**ESPC ENABLE *Request for   
Quote/*Notice of Opportunity Template**

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***PLEASE READ THIS GUIDE BEFORE USING TEMPLATE***

**ESPC ENABLE Request for Quote/Notice of Opportunity Guide**

**Introduction:** This template is a tool to assist you in forming and issuing your agency’s Request for Quote/Notice of Opportunity (subsequently referred to as NOO) for an ESPC ENABLE project. The NOO is the formal initiation of the ESPC ENABLE project, notifying the ESCOs of a specific project opportunity.

The NOO provides ESCOs with information about your prospective project and indicates the deadline to submit a response (see **02 Attachment 2 - ESCO Expression of Interest Form**) within a specified timeframe. You will evaluate these proposals based on the criteria outlined in your NOO using the **03 ESCO Evaluation Worksheet** to make a selection.

**Instructions:** The ESPC ENABLE NOO will be developed and issued by the Contracting Officer (CO). The NOO Template begins on the next page. Please remove this page before completing your NOO.

This template ***cannot be used without editing***. In the template, you will find two types of text. [Sample text will appear in black font.] Please review the [sample text] to ensure that it meets your agency specific requirements and project goals when using it in your NOO. [Text that requires you to insert agency- or project-specific information, or requires you to edit for your purposes, will appear in red font.] You should reformat this document to fit your agency’s formatting requirements for procurement documents.

**ESPC ENABLE Request for Quote/Notice of Opportunity Template**

TO: All GSA Multiple Award Schedule (MAS), Special Item Number (SIN) 334512 Contractors

FROM: (Insert Contracting Officers name and address)

DATE: (Insert date NOO is issued)

SUBJECT Request for Quote/Notice of Opportunity (NOO) for an ESPC ENABLE Energy Project

The (Agency/Sub-agency/Location/Site) invites current GSA MAS contract holders under SIN 334512 to submit a written response using the provided template (**Attachment 2 - ESCO Expression of Interest Form**) for the opportunity to be considered for this potential project. The (Agency/Sub-agency/Location/Site) is interested in upgrading/installing equipment related to the following systems: lighting; water; heating, ventilating, and air conditioning (HVAC); simple HVAC controls; solar photovoltaic (PV); and/or other systems (if pursing a Hybrid ENABLE project). (If more detailed information is available, please insert here, e.g., “replacing exterior lighting with LED technology.”) Information and data for the facilities considered is available in **Attachment 1 – Facilities and Energy Data**. The response is recommended not to exceed ten (10) pages including attachments.

To respond to this NOO, you must be qualified under the GSA MAS, SIN 334512, **and** be on the Department of Energy’s List of Qualified ESCOs. Additionally, ESCOs should have experience implementing upgrades to/installing lighting, water fixtures, simple HVAC controls, HVAC equipment, and solar PV systems.

The (Agency/sub-agency/Site) will select one ESCO from responses to the NOO to conduct an investment grade audit (IGA) of the facility using the standard tools provided by the Department of Energy’s Federal Energy Management Program (FEMP). The cost of the IGA will be included in the final price of the ESPC ENABLE project. Using the results of the IGA, the ESCO will prepare a Final Proposal (FP) based on the FEMP ESPC ENABLE **Final Proposal Requirements** (see attachment 3). Both the IGA and FP should adhere to the general conditions of the GSA MAS, SIN 334512, and the ESPC ENABLE **06 Scope of Work (SOW)**. The SOW will be provided to the selected contractor prior to the IGA. The agency will not be responsible for any costs incurred, such as proposal preparation costs or the costs incurred in conducting the IGA, unless a task order (TO) is awarded or authorized by the agency CO.

If selected, the ESCO shall be required to report final project data to FEMP including, but not limited to, implemented energy conservation measures, total project investment, contract price, contract term, award date, completion date, guaranteed cost savings, and total energy savings.

**Each ESCO response must address the following:**

* ESCO Qualifications and Past Performance
* Price Component
* Other (Insert any additional requirements you deem necessary for ESCO responses. Some examples are environmental concerns, experience working with small businesses and/or local subcontractors, experience dealing with hazardous materials, experience implementing projects in coastal or island settings, remote and/or multi-site locations, etc. Please remember the 10 page recommended maximum noted above. Also, if you add items to this list, they should be reflected in your evaluation criteria [below])

The selection process will be based on the ESCO’s qualifications and a price component in accordance with the best value criteria defined by FAR 2.101. The criteria will be weighted (equally/of descending importance/based on the following values [insert specific weights]):

* **ESCO Qualifications and Past Performance:** To what extent did the contractor demonstrate compliance with similar work and scope? Also, what was the contractor’s performance with prior contract requirements (i.e., accurate reporting, timely delivery, on-cost delivery, and technical excellence)?
* **Price Component** (Criteria below are recommendations\*)**:**
  + The contractor will demonstrate ability to obtain low-cost financing, reflecting:
    - Interest rate index and spread of last 3 projects, with term and size of loan
    - Whether ESCO has master purchase agreement with at least one financier
    - Any credit ratings issued by Moody’s, S&P, or Fitch
    - Whether ESCO is covered under a parent company guarantee
  + The contractor will estimate extent to which work will be self-performed vs. subcontracted (%)
  + The contractor will describe methods, procedures used to obtain competitive prices on ECMs and financing
* (Insert additional evaluation criteria as appropriate)

\*Note that projects with a single or predominant ECM can select ESCO based on anticipated project price by including price component of unit installed cost, e.g., $/kWh for solar PV, or $/installed LED fixture. In these cases, weight price component more heavily.

The timeline for this selection process is as follows:

* Closing date for expression of interest:  Two weeks from today (or another timeline specified in your acquisition plan)
* Agency’s review process: (Indicate end date for review process, recommend no more than one week)
* Date for notification to unsuccessful offerors: One week from Expression of Interest submission
* Unsuccessful offeror debrief opportunity: 5 business days
* Date for notification and discussions with successful offeror:  One week from Expression of ESCO Interest submission

**Attachments:**

1 - Facilities and Energy Data

2 - ESCO Expression of Interest Form

3 - Final Proposal Requirements

# 02 Attachment 1 – FACILITIES AND ENERGY DATA

The facilities’ physical location and data represent the potential project and known energy consumption. The location and data do not represent the final project that may be identified as the result of the selected ESCO’s investment grade audit. The agency reserves the right to consider viable energy conservation measures (ECMs).

(Provide facility and energy data in the tables below for all sites considered. Or, if you have your own tables or format for the information below, please attach it. The facility information here is just a sample; please remove it prior to use.)

## Facility Data

| [**Location**](#Instruct_Buildings) | [**Number of buildings**](#Instruct_NumberofBuildings) | **Building Size** | [**Mission/Comment**](#Instruct_buildingmission) | [**Existing Facility Conditions**](#Instruct_buildingmission) |
| --- | --- | --- | --- | --- |
| List the major project site | Identify the total number of buildings | List the estimated total building size (in square feet) for each project site. | Indicate the project site(s)’ primary mission and any useful information to assist the ESCOs in responding to the NOO | Describe the project site(s)’ current condition and the age of the site(s). Include typical operating hours, a list of existing equipment, and description of major equipment replacement (if any). |
| XYZ Park, San Francisco, CA | 10 | 10 buildings ranging from 100 sq. ft. to 20,000 sq. ft. in size. Approx. 45,000 sq. ft. in total | The buildings are a mixture of administrative offices, warehouses, and a visitor’s center. | All buildings circa 1960 with very limited upgrades since. Possible asbestos. |

## Energy Data (May use Agency Annual Report as a data source \*\* Please use the most recent year’s data whenever possible)

|  | **Energy Rate $** | [**Energy Units**](#Instruct_EnergyUnits) | [**Annual Total Use**](#Instruct_AnnualEnergyUse) | [**Annual Unit of Measure**](#Instruct_AnnualUnits) | [**Total Annual Cost**](#Instruct_AnnualEnergyCost) |
| --- | --- | --- | --- | --- | --- |
| **Electricity** |  | Choose units |  | Choose units |  |
| **Natural Gas** |  | Choose units |  | Choose units |  |
| **Water** |  | Choose units |  | Choose units |  |
| **Other** |  | Choose units |  | Choose units |  |
| **Total Annual Cost** |  | | | |  |
| **Average monthly peak electricity demand (kW):** | | | | | |

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# 02 Attachment 2 - ESCO EXPRESSION OF INTEREST

(This form must be included as an attachment to **02 Notice of Opportunity Template**, along with **02 Attachment 1- Facilities and Energy Data**. ESCOs are required to submit their responses to the NOO within the timeframe specified by the ordering agency using this form. The response is not to exceed the page limit given in the NOO, including attachments. **Please ensure that the roman numerals below match the submission requirements you outlined in the NOO**)

**ESCO EXPRESSION OF INTEREST Template**

(Insert company name)

Address 1

Address 2

City, State Zip Code

Dear (Insert Agency name):

In response to your Request for Quote/Notice of Opportunity (NOO), (insert ESCO name) would like to execute an investment grade audit (IGA) and develop an ESPC ENABLE project at the (Insert project location[s]).

| **Facilities & Locations** | **Site Point of Contact** | **ECMs** | **Project Investment** | **Guaranteed Savings** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. ESCO Qualifications & Past Performance
2. Price Component
3. Other (if applicable)

Primary and Secondary Company Contacts

|  |  |
| --- | --- |
| Name of primary contact  Location  Mailing address  Phone number  Email address | Name of Secondary contact  Location  Mailing address  Phone number  Email address |

# 02 Attachment 3 – Final proposal requirements

**Final Proposal Requirements**

**A. Project Overview (length: 2 pages recommended)**

1. Executive Summary - As a minimum, a narrative description of the project summarizing the ECMs, the energy, water, and related cost savings, implementation price and financial summary.

2. Site Description and Utility Summary - For the site, the contractor shall submit narrative information for items, as applicable, in the format specified below:

a. Site Description *may* include:

i. Overview, size, location, etc.

ii. Description of mission/commands/agencies on the site, general operations, occupancy.

iii. Map of site showing major areas/designations.

iv. Building/facility list, name/number, type of facility, square footage, hours of operation.

vii. Facility descriptions (for those buildings included in the ESPC). General description of building condition and operations, including overview of energy (mechanical/electrical) and water systems.

b. Utility Summary

i. Overview/description of current utility systems on site: electrical, natural gas, fuel oils, water, sewer, etc. Include site diagrams/maps, as available.

ii. Description of metering systems for each utility.

* Utility/revenue meters.
* Sub-meters, advanced metering systems, as applicable.

**B. Volume I - Technical Proposal (length: see sub-sections)**

1. ECM description (length: 3 pages per ECM recommended) - For each ECM proposed, the contractor shall submit narrative information for items as applicable, in the format specified below:

a. ECM description (existing conditions, proposed upgrades)

b Location affected

c. Energy baseline

d. ECM projected energy use and cost

e. Proposed equipment identification, including manufacturer, model number, and optional equipment proposed for each ECM component. (May be presented as appendices and excluded from page limit.)

f. ECM project schedule – Provide a detailed project schedule, including the duration of the following key phases:

i. Equipment procurement/lead time (i.e., date required to acquire equipment and delivery on-site)

ii. Installation, commissioning, post-installation M&V, and post-installation report

iii. Project acceptance

2. ECM Performance Measurement (length: pre-defined by FEMP provided template)

a. The M&V plan shall be completed using the provided FEMP ENABLE **08\_M&V Plan Template**.

b. ECM Commissioning Approach – The contractor shall prepare an ECM Commissioning Approach for each of the proposed ECMs based on the FEMP ENABLE **09\_Project Commissioning & Acceptance Guide and Checklist**.

3. Management Approach (length: 2 pages recommended)

a. Organization -Show the organization for implementing and managing the task order (TO) project through the use of an organizational chart. The proposed organization shall contain the responsibilities of each element shown on the organizational chart. Identify personnel integral to the performance of the ESPC project by name within each element. Show the lines of authority within the organization. If portions of the project are to be subcontracted (e.g., installation of an energy conservation system), identify the subcontracted function, and which element of the contractor’s organization will manage the subcontract(s).

**C. Volume II - Price Proposal** - The selected contractor shall complete financial Schedules 1, 2, 3, 4 (populated by results from FEMP ENABLE IGA Tool), and 5, and shall provide supporting documentation listed below. The contractor is required to submit project-level financial and energy-savings information into the eProject Builder (ePB) online system, which will then generate the full set of Task Order financial schedules. The data requirements are specified on the ePB website and may be amended from time-to-time. Please see: <https://eprojectbuilder.lbl.gov>

1. In addition to the submission of TO schedules and supporting documents, the contractor shall provide information on how financing was competitively selected (desire is to solicit 3 bids).

**D. Individual Small Business Subcontracting Plan** – In the event the selected contractor meets the prescription of FAR 52.219-9, then the selected contractor shall prepare and submit the required document.