

*Post-Installation Report: Review Checklist*

ESPC Process Doc. P4-03

Rev. 11-14-18

Responsibility: PF

**POST-INSTALLATION REPORT: REVIEW CHECKLIST**

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| **Project Name** |       |
| **FEMP ID#** |       |
| **Agency** |       |
| **Project Facilitator** |       |
| **Date of Review** |       |
| **M&V Report Title** |       |
| **M&V Report Date** |       |

**Overall**

[ ]  Post-Installation Report has been reviewed in accordance with “Reviewing Post-Installation and Annual Reports for Federal ESPC Projects” guidance (reference IDIQ, Sec. C.4.2.C and Attachment J-17)

[ ]  Post-Installation Report follows the required outline and contents (reference IDIQ Sec. C.4.2.C and Attachment J-9)

[ ]  Post-Installation Report includes results of eProject Builder output and M&V data and calculations (reference IDIQ, Sec. 4.2.C and Attachment J-15)

[ ]  Inspections and measurements conducted by the Contractor are witnessed by the ordering agency in accordance with guidelines (reference IDIQ Sec. 4.2.C and "Guide to Government Witnessing and Review of Measurement and Verification Activities”)

[ ]  Documentation of government witnessing is included in the annual M&V report (per IDIQ Attachment J-9, Sec. J-9.2.3.C)

[ ]  Reported M&V results (including measurements, monitoring, and inspections) are consistent with the M&V Plan in the awarded proposal (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 2.1)

[ ]  Any changes in project scope between the final proposal (or Task Order contract) and as-built conditions are detailed (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 1.2)

[ ]  Any energy and/or cost savings adjustments from the final proposal (or Task Order contract) are summarized (including any needed baseline adjustments) (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 2.4)

[ ]  Issues/deficiencies that need follow up were identified and have been relayed to the agency/site and the ESCO (reference ” Reviewing Post-Installation and Annual Reports

 for Federal ESPC Projects”, Steps 5 and 6 and Post-Installation Report Checklists, Part 2.3)

[ ]  Rates in the final proposal (or Task Order contract) were used to calculate savings and rates adjustment factors were applied correctly (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 2.4)

[ ]  Calculations of construction period savings are summarized (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 1.6)

[ ]  Based on post-installation testing, savings guarantee in Year 1 is expected to be met (or detailed explanation is provided if not expected) (reference ” Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Post-Installation Report Checklists, Part 1.2)

[ ]  Project Facilitator supports the approval/acceptance of the post-installation report based on their review

**Summary of Key Issues/Findings** (List main areas of concern and clarifications identified in review)

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