**Utility Energy Service Contract (UESC)
Planning & Document Development Checklist**



**Phase 1: Acquisition Planning 2-4 weeks**

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|  | **Task** | **Resources** |
|  🞎 | Agency develops initial project scope and limited acquisition plan | * Limited Acquisition Plan –Template
 |
|  🞎 | Agency drafts initial Justification & Approval (J&A)  | * J&A – Sample
 |



**Phase 2: Utility Selection & Preliminary Assessment (PA) 4-6 weeks**

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|  | **Task** | **Resources** |
|  🞎 | Agency surveys eligible serving utilities | * Letter of Interest – Template
 |
|  🞎 | Agency provides fair consideration of utilities | * Utility Selection Evaluation Factors
 |
|  🞎 | Agency selects utility and notifies all utilities of selection | * Utility Selection Letter – Template
 |
|  🞎 | Agency issues an authorization/task order for PA | * EMSA – SampleLetter of Request for PA – Template
* PA SOW – Template
 |
|  🞎 | Utility conducts PA and agency reviews PA | * eProject Builder (ePB)
 |



**Phase 3: Project Development 12-16 weeks**

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|  | **Task** | **Resources** |
|  🞎 | Agency issues an authorization/task order for Investment-Grade Audit (IGA) | * Letter of Request for IGA – Template
* GSA Sample -
* Notice to Proceed to IGA – Sample
 |
| 🞎 | Utility conducts IGA and develops IGA report* Develops technical scope for firm-fixed price with ECMs sufficiently detailed to acquire competitive subcontractor bids
* Utility solicits bids from subcontractors
 | * eProject Builder (ePB)
 |
| 🞎 | Utility develops performance assurance plan | * Performance Assurance Planning - Guide
 |
| 🞎 | Agency reviews IGA and performance assurance plan | * eProject Builder (ePB)
 |
| 🞎 | Agency develops statement of work and initial TO for installation | * FAR Clauses for UESCs
* Standard Form 26 – Sample
* Task Order for Design and Installation – Sample
* Performance Assurance Considerations for TO Language
 |
| 🞎 | Agency completes “business clearance” or “recommendation to award” | * Business Clearance Memorandum – Sample
 |
| 🞎 | Agency requests and utility provides proposal with firm-fixed price, subcontractor bids, and financing | * Letter Requesting a Firm-Fixed Price – Template
 |
| 🞎 | Agency and utility finalize task order for installation* Negotiate final technical scope and cost
* Agency indicates agreement to finance terms
* Utility provides final proposal and agency updates task order to reflect negotiations
 |  |
| 🞎 | Agency awards task order for UESC and reports project information to FEMP and GSA* For contracts valued above $13.5 million, agency provides written notification to Congress 30 days prior to award (DoD, NASA, and Coast Guard only notify Congress of contracts above $135 million)
* On day of award, agency CO publicly announces projects awarded over $4 million (unless otherwise stated by agency acquisition regulations)
 | * UESC Project Reporting – Template
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**Phase 4: Implementation and Construction Installation Period**

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|  | **Task** | **Resources** |
|  🞎 | Utility finalizes design and performance assurance plan |   |
|  🞎 | Utility installs ECMs and agency provides oversight |  |
|  🞎 | Utility commissions ECMs and submits commissioning report | * Performance Assurance Planning - Guide
 |
|  🞎 | Agency reviews commissioning report and verifies performance | * ECM Performance Verification Checklist – Sample
 |
|  🞎 | Utility provides O&M training to agency staff | * Performance Assurance Planning - Guide
 |
|  🞎 | Agency accepts project | * Letter of Final Acceptance – Template
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**Phase 5: Post-Acceptance Performance Term of Contract**

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|  | **Task** | **Resources** |
|  🞎 | Utility submits invoices and agency makes payments | * Invoice Approval and Payment Process – Template
* UESC Invoice – Sample
 |
|  🞎 | Utility or agency executes O&M, MRR, and recommissioning according to the performance assurance plan and TO | * Performance Assurance Planning - Guide
 |
|  🞎 | Agency closes out the contract at end of term |  |

Visit the UESC website to view and download resources referenced in this checklist.

[www.energy.gov/eere/femp/utility-energy-service-contracts-federal-agencies](https://www.energy.gov/eere/femp/utility-energy-service-contracts-federal-agencies)