**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 – Sample Letter 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 |



**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 |



**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)