**Utility Selection Evaluation Factors – Template**

Developing measurable and weighted criteria for the partnership and the project will contribute to a utility selection that will fit your program and project objectives. For example, each responding utility may provide the agency with information about its business model, including project management, technical expertise, subcontract plan, and ability to provide competitive financing. When more than one utility is interested and capable of providing a UESC, it is beneficial to use limited competition requirements sufficient to make a selection.

To date, the majority of UESC projects have been accomplished by electric and natural gas utilities including a subset of excellent projects done by cooperative and municipal utilities. Most water utilities are municipal entities and by necessity limit their time and resources to offering and implementing water-related opportunities.

**Utility Selection Evaluation Factors**

**Template**

**FOR**

**UESC**

**Site**

**Address**

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

**NOTE**: This plan is for use by the Government's technical evaluation panel and is***NOT*** part of the solicitation package. The information contained herein is for ***GOVERNMENT USE ONLY*** and ***SHALL NOT BE RELEASED*** to prospective offerors.

This plan contains confidential source selection information.

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**FOR OFFICIAL USE ONLY**

THIS REPORT COVERS THE FINAL EVALUATION

BY THE EVALUATION BOARD (EB)

**Request for Qualifications: RFQ-GS-**

**Utility Energy Services Agreement (ESA) under AWC #**

**Submitted by:**

|  |  |
| --- | --- |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_Voting Member/Chairman | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_Voting Member |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_Voting Member | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_Voting Member |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_Voting Member |  |

**Approved by:**

|  |
| --- |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_CO (Agency) |

**Concurrence (for legal sufficiency):**

|  |
| --- |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_Legal Counsel |

**Utility Selection Report**

*I. DESCRIPTION OF SERVICES TO BE ACQUIRED*

*Agency* seeks to obtain energy management services from a local utility company through the issuance of TOs under the GSA AWC to design and install energy improvements. The estimated total value of the entire Project is between *$xx.xx and $xx.xx*. While *Agency* expects to fund the Investment Grade Audit (IGA) with appropriated funds, the anticipated obligated amount for Design and Installation (D&I) may, in accordance with applicable law and policy, be combined with private financing in order to leverage government funding and optimize Project scope and reductions in energy use and cost of facility operations.

*II. DESCRIPTION OF THE SOURCE SELECTION APPROACH USED*

The Government will evaluate each Offeror and select the one that provides the best fit for the project based on qualifications and experience set forth in the RFQ. Best fit means the expected outcome of an acquisition that, in the Government’s estimation, provides the greatest overall benefit in response to the requirement.

One of several ratings (e.g., excellent, very good, good, etc.) was assigned in order to express judgment on each major evaluation factor. Points were assigned to facilitate arrival at final scores so that companies can be ranked in order of preference. The evaluation board (EB) used the following basic scoring plan for each proposal:

|  |  |  |  |
| --- | --- | --- | --- |
| Adjectival rating | Point range | Definition | Point range |
| Excellent | 90 – 100 | Exceeds all requirements | 90 – 100 |
| Very good | 80 – 89 | Exceeds most requirements | 80 – 89 |
| Good | 70 – 79 | Meets standard | 70 – 79 |
| Marginal | 60 – 69 | Lacks material information | 60 – 69 |
| Unacceptable | 0 – 59 | Inadequate | 0 – 59 |

*III. EVALUATION FACTORS*

**A. Experience Relative Weight 30%**

This factor considers the extent of the Offeror’s past experience in performing energy projects. The Offeror shall demonstrate past organizational experience as an entity responsible for the delivery of at least one (1) “turnkey” (i.e., design, construction, and operations and maintenance [O&M]) energy project. Additional consideration will be given to projects that contain any or all of the following special characteristics: (1) adaptive reuse; (2) heightened security; (3) phased construction; (4) renewable energy systems; (5) campus setting; and (6) Federal Government as owner.

The Offeror may submit up to two (2) additional energy projects showing varied nature, type, and complexity.

In addition to providing a brief narrative for each project submitted, please provide the following:

1. Title
2. Owner
3. Occupant(s)/Tenant(s)
4. Location
5. Description
6. Size (MW and GSF/OSF)
7. Special Characteristics
8. Construction Type (i.e., design-build, design-bid-build, etc.)
9. Contract Type
10. Contractor Responsibilities (Scope of Work)
11. Date of Award
12. Date of Substantial Completion
13. Cost at Award
14. Cost at Completion
15. Schedule Completion Time (days)
16. Actual Completion Time (days)
17. Number of Change Orders
18. Classification (reason) of Change Orders

**B. Past Performance Relative Weight 30%**

This factor considers the quality of the Company’s past performance on the project(s) submitted under Factor A with reference to such aspects as costs, timeliness, and technical success.

**C. Key Personnel Relative Weight 20%**

This factor considers the qualifications of the Key Personnel proposed by the Company to execute the contract requirements for the positions proposed. The Company must submit the information for the following positions: principal-in-charge; principal project manager; lead mechanical engineer; lead electrical engineer; and lead systems control designer.

Please provide a resume for each person that addresses the following areas: education; professional experience; licenses/certifications; and accomplishments.

**D. Narrative – UESC Program Relative Weight 20%**

*Description*: This factor considers the Company’s UESC Program and applicability to the Project. The Company should address the following:

1. UESC Program concept/vision statement;
2. Historical energy use at the site;
3. Existing energy laws with a focus on assisting the Federal Government to meet any environmental, “green,” and/or energy savings requirements, mandates, and/or goals as set forth by the U.S. Congress or any Executive Branch Agency by way of laws, regulations, Executive Order (EO), or other;
4. Method for ensuring that quality and price are considered when procuring the architectural, engineering, installation, and performance of the work;
5. Strategies for performance assurance.

##### IV. SUMMARY CHART (SELECTING UTILITY BASED ON EXPERIENCE & QUALIFICATIONS)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Natural Gas Company** |   |   |   |   |
| Factor | Raw Score | Adjectival | Weight | Weighted Score |
| Experience |  |  |  |  |
| Past performance |  |  |  |  |
| Key personnel |  |  |  |  |
| Concept / Vision |  |  |  |  |
| Consensus |  |  |  |  |
|   |   |   |   |   |
| Electric Company |   |   |   |   |
| Factor | Raw Score | Adjectival | Weight | Weighted Score |
| Experience |  |  |  |  |
| Past performance |  |  |  |  |
| Key personnel |  |  |  |  |
| Concept / Vision |  |  |  |  |
| Consensus |  |  |  |  |
|  |  |  |  |  |
| Water Company |   |   |   |   |
| Factor | Raw Score | Adjectival | Weight | Weighted Score |
| Experience |  |  |  |  |
| Past performance |  |  |  |  |
| Key personnel |  |  |  |  |
| Concept / Vision |  |  |  |  |
| Consensus |  |  |  |  |

##### V. SUMMARY (PRICING EVALUATION)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | BASE& OPTIONS | WaterUtility | Natural GasUtility  | ElectricUtility |
| 1 | Overhead (OH) |  |  |  |
| 2 | Profit |  |  |  |
| 3 | Contingency |  |  |  |
| 4 | Tier 1 Sub OH |  |  |  |
| 5 | Tier 1 Sub Profit |  |  |  |
| 6 | Tier 2 Sub OH |  |  |  |
| 7 | Tier 2 Sub Profit |  |  |  |
| 8 | Bond |  |  |  |
| 9 | Risk Insurance |  |  |  |