

*Annual M&V Report Review Checklist*

ESPC Process Doc. P5-01

Rev. 11-14-18

Responsibility: PF

**ANNUAL M&V 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**

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

Annual report includes an annual M&V schedule report generated from eProject Builder (see IDIQ, Part J.15.3.e and Attachment J-15)

Annual M&V report follows the required outline and contents (IDIQ Sec. C.4.2.D and Attachment J-10)

Inspections and measurements conducted by the Contractor are witnessed by the ordering agency in accordance with guidelines (see "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-10, Section J-10.2.2.C)

Annual M&V report contains a “running log” that documents, on a continuous, annual basis, the changes or impacts that have affected the ability of the project to generate energy savings (IDIQ, Sec. C.4.2.E)

Annual M&V report contains a copy of each year’s previous comments and responses in its Appendix (IDIQ, Sec. C.4.2.F)

Annual M&V report contains records that document the ECM affected, dates of incidents, repairs, and/or replacements implemented, and descriptions of activities performed. This applies to operations and maintenance (including inspections), repair, and replacement activities (regardless of who performs the work) (IDIQ, Sec. C.6.D and E)

Impact of all deficiencies or enhancements on the generation of savings have been described, including but not limited to (reference IDIQ Sec. J-10.1.3 (including completed Table 3), J-10.1.5 (including completed Table 4), J10.2.2 Part H, J10.2.6 and ”Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Annual Report Checklists, Parts 1.5, 2.2, and 2.5):

1. O&M (including preventative maintenance)
2. Performance
3. Repair and replacement

Issues/deficiencies that need follow up have been relayed to the agency/site and the ESCO (reference “Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Annual Report Checklists, Parts 1.5, 2.2, and 2.5)

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”, Annual Report Checklists, Parts 2.1 and 2.2)

Any energy and/or cost savings adjustments are summarized (including any needed baseline adjustments) (reference “Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Annual Report Checklists, Parts 1.4 and 2.3)

Rates in the final proposal (or Task Order contract) were used to calculate savings and adjustment factors for rates were applied correctly (reference “Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Annual Report Checklists, Parts 1.6 and 2.3)

Savings guarantee was met (or detailed explanation provided if not fulfilled) (reference “Reviewing Post-Installation and Annual Reports for Federal ESPC Projects”, Annual Report Checklists, Part 1.2)

Project Facilitator supports the approval/acceptance of the annual report based on their review

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

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