

*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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