



ESPC ENABLE Webinar for ESCOs

Chip Goyette – ESPC ENABLE
Program Lead

September 13, 2012

- Introductions and Purpose
- ESPC ENABLE Overview/Current State
- DOE Qualified List Application Process
- GSA Schedule 84, SIN 246-53 Application Process
- Questions & Answers

This presentation will provide you, the energy services company (ESCO), with the information necessary to decide whether or not to participate in the ESPC ENABLE program. Our goal is to provide you with the information needed to make that decision, and the necessary steps to take once it has been made.

ESPC ENABLE Overview and Current State

ESPC ENABLE is a new funding pilot program that:

- Is intended for Federal facilities with buildings under 200,000 square feet (traditionally, underserved market).
 - Or, facilities where ESPC ENABLE provides the best/only solution
- Provides a standardized and streamlined process to quickly award projects and generate savings using GSA Schedule 84.
- Targets straight-forward ECMs including lighting, water, and HVAC controls.
- Includes basic levels of measurement and verification (M&V) for each ECM.

ESPC ENABLE Energy Conservation Measures (ECMs)

- **Lighting**
 - Lamps, ballasts, fixtures
 - Lighting Controls (occupancy, day lighting)
- **Water**
 - Plumbing fixtures (sink, toilet, urinal, shower, etc)
- **Simple HVAC Controls**
 - Time/Temperature setback
 - Demand and Night Ventilation

Not included: HVAC replacement, advanced building controls

Overview – DOE ESPC IDIQ and ESPC ENABLE Crosswalk

	“Traditional” ESPC	ESPC ENABLE
Contract Vehicle	DOE ESPC IDIQ Contract	GSA Schedule 84 (SIN246-53)
Contract Term	Up to 25 Years	Up to 25 Years
Target Market	Unlimited	Small, federal facilities (~200K square feet)
Energy Conservation Measures	Unlimited (Includes renewables)	Lighting, Water, and basic HVAC Controls
Average Cycle	12-20 Months	12-15 Weeks (Anticipated)
Average Project Size (\$)	\$14M	\$500K-\$1M (Anticipated)
Average Contract Term	16 years	+/- 10 Years (Anticipated)
Required Project Facilitator (PF)	Yes	No
Prescribed M&V	Yes	Yes

Overview – Current State of ESPC ENABLE Program



Energy Efficiency &
Renewable Energy

- Pilot Project Kickoff – May 2012
- Schedule 84, SIN 246-53 Revision – June 2012
- ESPC ENABLE Website Launch – June 2012
- First NOO Issued – July 2012
- ESPC ENABLE Contract Document Templates (1-6) posted – July 2012
- Multiple competing ESCOs – Currently 8 on Schedule



Acquisition Planning

Activities: Estimated timeline - 1-2 Weeks

- Essential members of the acquisition team are identified
- Agency hosts kickoff meeting with acquisition team members
- Agency develops an Acquisition Plan*
- Agency develops the Request for Quotation/Notice of Opportunity*

**Indicates FEMP-provided template*



ESCO Selection

Activities: Estimated timeline - 3 Weeks

- Request for Quotation/Notice of Opportunity is released
- ESCOs express interest*
- Agency evaluates responses based on best value criteria outlined in the RFQ/NOO*
- Agency notifies unsuccessful offerors* and issues the notice of intent to award (NOITA)*

*Indicates FEMP-provided/required template

Tools can be found at:

http://www1.eere.energy.gov/femp/financing/espc_enable_process.html



IGA and Award

Activities: Estimated timeline - 3 Weeks

- ESCO performs Investment Grade Audit (IGA)* using FEMP-provided Excel survey tools
- ESCO submits final proposal*, final negotiations occur
- Agency awards task order

**Indicates FEMP-provided template*

Water and Lighting:

- Excel based spreadsheet tool calculates energy and cost savings based on pre/post fixture data, usage, energy/water costs, etc.

HVAC Controls:

- Tool utilizes a simulation program (EnergyPlus) running in the background to calculate pre and post energy consumption and returns data to spreadsheet.

Tool Outputs: form the basis for contract documents. Tool auto-generates summary data tables and audit findings.

Audit tool: Lighting – Overview


1. Project Info, Summary Totals

2. Energy Cost/ Schedule Inputs

3. Usage

Group Table

4. Controls Table



Lighting Retrofit Audit Template v1.2b

Project Name: _____

Site Address: _____

Agency: _____

ESCO: _____

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Instructions

1. Populate "Lighting Fixture Master List" worksheet with Existing/Replacement fixture details

2. Blue cells: Input values as required

3. Yellow cells: Select from pull-down list

4. Grey cells: Auto calculated/populated values

*Note: Add "Controls Adjustment Factor" (Column K) to account for effects of control devices

Round All Lighting equipment prices for proper line-item calculation

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (input) **Chiller cost:** **\$0.00** (input)

Electric Resistance: **0%** (input) **SWch:** **0%** (input)

Heat Pump: **0%** (input) **SWch:** **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Approximate % of Area within 15% of perimeter wall: **0%** (input)

Lighting Common Table Information

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

Control Type: **On/Off** (input)

Power Adjustment Factor: **1.00** (input)

REMARKS

Demanded Rate: **\$0.00** (input)

Conference Rate: **\$0.25** (input)

Demanded Charge (\$/kW): **\$0.25** (input)

Data for HVAC interaction calculations

Is scope for heating: **Yes** (input) **Heat cost:** **\$0.00** (input)

Is scope for cooling: **Yes** (

5. Space Description

6. Pre-retrofit Inputs

7. Post-retrofit Inputs

8. Savings Outputs

9. Fixed cost

Outputs

Audit Tool collects room-by-room data of pre and post retrofit conditions

Audit Tool: Lighting – Master List

Directions:

1. Input fixture details into table below (data may be manually entered by line or cut and paste from pre-existing tables)
2. Using Status column (highlighted in yellow) Identify fixtures as "Existing" or "Replacement". Identified fixture will appear in pull-down menus on main audit worksheet
3. Enter measured wattage values for fixtures sampled, note location of measurement and witness information

Note: Measurements to be taken on fixture types that represent at least 75% of the existing baseline load and entered in fields M1-M3, for fixtures not measured enter standard manufacturers wattage in field "M1"

Status	Fixture Code	Lamp Code	Description	Ballast	Lamp/Fixt	Watt/lamp	reg watt/fixt
-	CF28/1-SCRW	CF28W	Compact Fluorescent, (1) 28W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	28	28
Replacement	CF32/1-SCRW	CF32W	Compact Fluorescent, (1) 32W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	32	32
Existing	CF4/1-SCRW	CF4W	Compact Fluorescent, (1) 4W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	4	4
-	CF42/1-SCRW	CF42W	Compact Fluorescent, (1) 42W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	42	42
-	CF44/1-SCRW	CF44W	Compact Fluorescent, (1) 44W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	44	44
-	CF52/1-SCRW	CF52W	Compact Fluorescent, (1) 52W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	52	52
Replacement	CF60/1-SCRW	CF60W	Compact Fluorescent, (1) 60W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	60	60
Replacement	CF65/1-SCRW	CF65W	Compact Fluorescent, (1) 65W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	65	65
Replacement	CF7/1-SCRW	CF7W	Compact Fluorescent, (1) 7W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	7	7
-	CF80/1-SCRW	CF80W	Compact Fluorescent, (1) 80W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	80	80
-	CF85/1-SCRW	CF85W	Compact Fluorescent, (1) 85W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	85	85
-	CF9/1-SCRW	CF9W	Compact Fluorescent, (1) 9W screw-in lamphouse w/ permanent disk installed, any bulb shape	Mag. or Elec.	1	9	9

Fixture Measurement and Verification Data					
Location of fixture measurement	Enter measure wattage here				Inspected/Witnessed by
	M1	M2	M3	AVG	
Entry hallway - 1st floor	31.0	31.5	32.4	31.6	ESCO ABC: B. Smith / Agency XYZ: J.Jones, 2/5/12
Entry hallway - 1st floor	4.3	4.2	3.9	4.1	ESCO ABC: B. Smith / Agency XYZ: J.Jones, 2/5/12
Entry hallway - 1st floor	60.5	60.1	61.0	60.5	ESCO ABC: B. Smith / Agency XYZ: J.Jones, 2/5/12
hallway - 2nd floor	64.0	64.2	65.2	64.5	ESCO ABC: B. Smith / Agency XYZ: J.Jones, 2/5/12
lobby	7.1	7.1	7.0	7.1	ESCO ABC: B. Smith / Agency XYZ: J.Jones, 2/5/12

unit cost	labor cost	disposal cost
10	1	0.5
12	1.5	0.25
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5
10	1	0.5

- Equipment Data,
- ID of Existing or Replacement

M&V Data
Inputs

Unit Cost
Inputs

ESCO generates Master list of pre/post equipment

- Equipment appears in "pull-down" menus on audit sheet
- Audit sheet is auto-populated with data from master

Building Parameters

Building Information

ASHRAE Climate Zone:

State:

City:

Building Type:

Building Geometry

Floor to Floor Height: ft

Length 1: ft

Length 2: ft

Width: ft

Number of Floors:

Orientations: degrees

Roof Type:

Wall Type:

Geometry Configuration:

Zone Layout:

Building Activity

Total Number of People: people

Electrical Plug Intensity: W/ft²

Light Intensity: W/ft²

Exterior Lighting: W

Building Fenestration

Orientation	Glazing Percentage	Window Type
South	<input type="text"/> %	<input type="text"/>
West	<input type="text"/> %	<input type="text"/>
North	<input type="text"/> %	<input type="text"/>
East	<input type="text"/> %	<input type="text"/>

Building HVAC System

HVAC Type:

Fan Static Pressure: inches of water

Total Fan Efficiency: %

Cooling COP:

Heating Efficiency:

Outside Air Ventilation Per Person:

Outside Air Ventilation Per Area:

Flow Per Exterior Surface Area:

Restore Defaults

Pre/post Controls Parameters

Utility Prices

Electricity Price: \$/kWh

Natural Gas Price: \$/therm

HVAC Control Type

Setpoint:

Cooling Setback Temp: 80

Heating Setback Temp: 60

Cooling Setpoint Temp: 72 74

Heating Setpoint Temp: 72 68

Weekday Occupancy Start Time: 07:00 07:00

Weekday Occupancy End Time: 16:00 16:00

Weekend Occupancy: No No

Weekend Occupancy Start Time:

Weekend Occupancy End Time:

Night Cycle: Cycle On Any Stay Off

Night Ventilation: No No

Demand Ventilation: No No

Pre/Post Simulation Results

Energy Savings

Category	Value	Unit	Category	Value	Unit
Heating Elec	0	MBTU	Heating Elec	\$0.00	\$
Heating Nat Gas	-2.66	MBTU	Heating Nat Gas	-\$39.91	\$
Cooling Elec	13.17	MBTU	Cooling Elec	\$385.97	\$
Fan Elec	6.46	MBTU	Fan Elec	\$189.32	\$
Pump Elec	0	MBTU	Pump Elec	\$0.00	\$
Total Elec	19.64	MBTU	Total Elec	\$575.59	\$
Total Nat Gas	-2.65	MBTU	Total Nat Gas	-\$39.76	\$
Total Energy	16.99	MBTU	Total Energy	\$535.83	\$
Total Energy/Area	0.00095	MBTU/ft ²	Total Cost/Area	\$0.03	\$/ft ²

Baseline Outputs

Heating Elec	0	MBTU
Heating Nat Gas	24.29	MBTU
Cooling Elec	61.46	MBTU
Fan Elec	15.17	MBTU
Pump Elec	0	MBTU
Total Elec	150.66	MBTU
Total Nat Gas	34.33	MBTU
Total Energy	184.99	MBTU
Total Energy/Area	0.01035	MBTU/ft ²
Total Cost/Area	\$0.28	\$/ft ²

Proposed Outputs

Heating Elec	0	MBTU
Heating Nat Gas	26.95	MBTU
Cooling Elec	48.29	MBTU
Fan Elec	8.71	MBTU
Pump Elec	0	MBTU
Total Elec	131.02	MBTU
Total Nat Gas	36.98	MBTU
Total Energy	168	MBTU
Total Energy/Area	0.00940	MBTU/ft ²
Total Cost/Area	\$0.25	\$/ft ²

HVAC Parameters

FEMP audit tool auto-generates several outputs for use in contractual documentation

- Savings Summary Tables
- Retrofit Equipment Summary Tables
 - Fixture summaries, Bill of Materials
- Task Order Schedule 4 (TO-4)

SCHEDULE DO-4 FIRST YEAR ENERGY AND COST SAVINGS, BY ECM, TECHNOLOGY CATEGORY, AND DELIVERY ORDER																
Project Site:		Delivery Order No:			Contractor Name:			Project Square Footage (KSF)								
Tech No.	ECM No.	(a) ECM Energy Baseline (MBTU/yr)	(b1) Electricity Savings (kWh/yr)	(b2) Electricity Savings (\$/yr)	(c1) Demand Savings (kW/yr)	(c2) Demand Savings (\$/yr)	(d1) Natural Gas Savings (MBTU/yr)	(d2) Natural Gas Savings (\$/yr)	(e1) Fuel Oil Savings (MBTU/yr)	(e2) Fuel Oil Savings (\$/yr)	(f)=0.003413* b1+d1+e1 Energy Savings (MBTU/yr)	(g)=b2+c2+d 2 +e2 Energy Cost Savings (\$/yr)	(h) Other Energy- Related and O&M Cost Savings (\$/yr)	(i) = (g)+(h) Estimated Annual Cost Savings (\$/yr)	(j) Implementatio n Price (\$)	(k)= (j) / (i) Simple Payback (yrs.)
5	Lighting	114	25,170	\$2,391	20	\$182	0	\$0			86	\$ 2,573	\$0	\$ 2,573		0.0
13	Water	11	0	\$0	0	\$0	3	\$42	-	\$ -	3	\$ 42	\$0	\$ 42		0.0
3	HVAC Cntrl	-	0	\$0	0	\$0	0	\$0	-	\$ -	0	\$ -	\$0	\$ -		#DIV/0!
TOTAL		124	25,170	\$2,391	20	\$182	3	\$42	-	\$0	89	\$2,615	-	\$2,615	\$0	#DIV/0!

Installation

Activities: Estimated timeline ~ 6 Weeks

- Installation
- Measurement and Verification (M&V)*
- Commissioning*
- Agency Acceptance*

** Indicates FEMP provided plan templates and report outlines*





Performance Period

An annual M&V audit performed to verify the achievement of annual cost savings performance guarantees provided by the ESCO

- ESCO or agency must perform annual audit
- Equipment inspections are performed as prescribed in the M&V plan to verify savings achievement
 - Primarily Option A
- An annual M&V Report* is to be generated by the ESCO and submitted to the agency

** Indicates FEMP provided report outline*

FEMP Activities

- Work with agencies to build institutional support and initiate ESPC ENABLE pilot projects
- Continue ESCO engagement and expand ESCO pool
- Apply lessons learned related to ESPC ENABLE process, templates, tools, and pilot projects

Key Points

- Small building approach using a streamlined GSA Schedule 84
- Requires use of FEMP tools and templates
- FEMP will continue to direct market and ESCOs are encouraged to do the same
- Use the information provided today to decide if ESPC ENABLE is something you would like to pursue

Chip Goyette

Federal Energy Management Program
(FEMP)

202-586-9209

chip.goyette@ee.doe.gov

Bob Slattery

Oak Ridge National Laboratory (ORNL)

865-548-0549

slatteryrs@ornl.gov

Ben Engleman

Energetics, Inc. (contract support to
FEMP)

202-406-4110

Benjamin.engleman@hq.doe.gov

DOE Qualified List of Energy Services Companies

FEMP established the Department of Energy (DOE) Qualified List of Energy Service Companies (ESCOs) (DOE Qualified List) in accordance with the Energy Policy Act of 1992 (EPAAct 1992) and 10 CFR 436.

- Firms must be on the DOE Qualified List to be considered for Schedule 84, SIN 246-53
- Comprised of private industry firms
- Firms must apply to be considered
- Applications reviewed by Qualification Review Board (QRB)
- Firms must re-certify on an annual basis
- See FEMP Website for more information:

http://www1.eere.energy.gov/femp/financing/espcs_qualifiedescos.html

- First-time applicants must submit:
 - Statement of qualifications (Standard form 129 and supplemental questions 10A – 10E)
 - Two client questionnaires with original signatures from past project clients
- Special attention should be paid to project descriptions to demonstrate experience with **design** and **installation** of ESPCs or ECMs
- Personnel qualifications should be in the form of **resumes**
- Additional guidance and requirements available at:

http://www1.eere.energy.gov/femp/financing/espcs_qualifiedescos.html

Applications are accepted throughout the year and should be submitted to Cyrus Nasser of FEMP

(contact information available in the upcoming slides)

A QRB evaluates applications for the DOE Qualified List on the basis of statements of qualifications received and selects firms for inclusion on the qualified list if:

- The firm has provided ESPC services, or services that saved energy or reduced utility costs for not less than two clients; and the firm possesses the appropriate project experience to successfully implement the technologies that it proposes to provide.
- Previous project clients provide ratings that are "fair" or better.
- The firm, or any principal of the firm, has neither been insolvent nor declared bankruptcy within the last five years.
- The firm, or any principal of the firm, is not on the list of parties excluded from procurement programs (in other words, has not been debarred by the Federal Government) under 48 CFR part 9, subpart 9.4.
- There is no adverse information that warrants the conclusion that the firm is not qualified to perform energy savings performance contracting.

Please allow at least three months for the evaluation process to be completed.

Additional information on evaluation criteria for Supplemental Question 10B:

- Experience must be demonstrated in both design **and** installation of two projects. Experience in design only (i.e. A/E firms), or experience in construction only (i.e. ECM installation) is not sufficient for qualification.
- Construction experience must include **financial responsibility** for the installation of both projects, but may include the responsibility for using sub-contractors. **Construction management** experience without responsibility for the installation is not sufficient for qualification.
- A concise and thorough description must be provided for each of the two projects submitted for qualification.
- Answers to sub-part questions 1 through 13 **must all relate to the same project**, for each of the two projects described. Each question must be completely and thoroughly answered.

If you are interested in applying to become a DOE-qualified ESCO, you should:

- Visit the FEMP website and familiarize yourself with the process
- Download the application and supplemental questions and review them thoroughly
- Contact Douglas Eisemann if any questions or clarification are needed (*contact info on next slide*)
- Compile all necessary materials and send them to Cyrus Nasser (i>mailing address given on next slide)

To submit an application, send the compiled materials to:

Cyrus Nasser

Federal Energy Management Program

U.S. Department of Energy, EE-2L

1000 Independence Avenue, SW

Washington, DC 20585

Attn: Qualified List

For questions about the DOE Qualified List or the application process, contact:

Douglas Eisemann

SRA International, Inc.

Under contract to the U.S. Department of Energy

Douglas_Eisemann@SRA.com

703-284-8239



U.S. General Services Administration

Federal Acquisition Service

Schedule 84 and ESPC ENABLE

Kellie Stoker
Chief, Law Enforcement & Security Branch
Greater Southwest Acquisition Center(GSAC)

September 13, 2012

Topics

- Introduction
- Getting Started
- Overview of How to Prepare and Submit an eOffer
- Signing the eOffer
- ESPC ENABLE Info within the solicitation
- Review and Questions

What is GSA's eOffer ?

- eOffer is a secure, web-based application that allows companies to electronically prepare and submit a Multiple Award Schedule (MAS) contract proposal to the Federal Acquisition Service (FAS).
- To use the eOffer system you must have a digital certificate. Obtaining a digital certificate should be the first step in the process. You may already have one if you have a current Schedule Contract on another program.

What is a Digital Certificate?

- A Digital Certificate is an electronic credential that is stored on your computer or on a token.
 - Asserts the identity of an individual
 - Enables Federal Acquisition Service (FAS) to verify the identity of the individual entering the system and signing documents.
 - Used to encrypt and decrypt data to ensure that it is securely transmitted.

First Steps Before Submitting an Offer

- Recently, CCR, ORCA and the Excluded Parties listing (EPLS) were merged into a new website called SAM – System for Award Management at the following address:

<https://www.sam.gov/portal/public/SAM/>

- If you were previously registered in CCR and ORCA, your data was migrated over, but you should log onto the new system and verify your information.
- If you were not previously registered in CCR or ORCA, you must register in SAM before starting the offer process.

How Does eOffer Use Digital Certificates?

- To authenticate user at login
- To ensure that only the people authorized to work on an eOffer are granted access
- To electronically sign the eOffer request
- We generally recommend that you obtain two digital certificates at a minimum in case the certified employee leaves the company or is out for an extended period of time.
- If you are using a consultant and authorize them to sign on behalf of the company, they will need a digital certificate also. (Many already have them.)

Accessing the Solicitation

- Review the solicitation document on FedBizOpps (download instructions are available at the end of this presentation.)
- Review the following documents before starting to prepare the offer:
 - 16. Information and Instructions to Offerors
 - 18. Critical Information Specific to Schedule 84
 - 20. Schedule 84 – FSC 63 – Technical Requirements
- These documents will provide specific information on starting to prepare your offer.

The Following Items Are Not Needed:

- Readiness Factors Evaluation
- Pathways to Success Training
(recommend/not required)
- D&B Open Ratings Report
- Prior and Current Year Financial Reports

What Special Item Numbers (SINS) Should I Offer?

- ESPCs are covered under SIN 246-53 – Facility Management Systems
 - Don't let the title fool you, the SIN description clearly identifies ESPCs in accordance with the Energy Policy Act of 2005.
- Along with 246-53 which provides for the Alternate Financing, you must also offer some products or services.

What Special Item Numbers (SINS) Should I Offer?

- SIN 246-52 – Professional Security / Facility Management Services.
- SIN 246-51 – Installation Requiring Construction (DB)
- SIN 246-1000 – Ancillary Supplies and/or Services

Price Proposal Information

- Copies of your current commercial pricelist for products or services offered must be submitted with the offer. See solicitation for information on offering Davis Bacon rates.
- Proposed financing rates must also be submitted with the offer. You will need to provide the basis used to develop your rates (i.e., US Treasury rates) as well as % or basis points being added.

Financing Rate Example – Percentage

Based on US Treasury Bill Average Life rate.

<u>Term (years)</u>	<u>Spread for + \$10,000,000</u>	<u>Spread for \$3M - \$10M</u>	<u>Spread for Less than \$3M</u>
Less than 11	1.80%	2.35%	2.45%
11 – 14	2.10%	2.40%	2.50%
14 – 25	2.35%	2.45%	2.55%

Financing Rate Example – Basis Points

The ESPC financing rate will be calculated using the 10-year Treasury Note Constant Maturity rate calculated to the most current month at the time of the proposal. A spread is formulated using the project term (5, 10, 15 year term), and project financed amount, and added to the index to obtain the final interest rate. The following financing spread is currently accepted under the contract.

Project Value (Project Term) + Basis Points

Projects less than \$5M (5 year term), 325 BP over Treasury

Projects \$5M - \$15 M (10 year term), 315 BP over Treasury

Project \$15M + (15 year term), 310 BP over Treasury

*Actual financing rate will be the lowest rate possible at the time of project financing

Technical Evaluation Factors

- For 246-53 - an offeror is expected to have at least two (2) years of Corporate Experience
- Five (5) projects, at least two(2) of the projects must either have been completed within the last two years or be on-going. For on-going contracts with a base year and option years, at a minimum the base year must have been completed; for multi-year task orders, at a minimum the first year must have been completed.

Technical Evaluation Factors

- Must be on the DOE ESCO Qualified list or provide evidence that evaluation is ongoing when offer is submitted.

Offer Submission into eOffer

- Once you have gathered your data and are ready to prepare your offer, you will access the eOffer website:

<http://eoffer.gsa.gov/>


- The eOffer system is a series of screens in which you input your offer data. The system will also advise you when to upload documents you have gathered such as pricelists, Commercial Sales Practices, technical info, etc.

Offer Submission into eOffer

- Uploading documents is much like attaching documents to an e:mail, so your documents must be in an electronic format.
- The system is designed to not let you proceed if you miss a step. For the items being waived, you can upload a blank sheet of paper.
- There are tutorials and help-guides on the eOffer page.

eOffer Successfully Submitted

eOffer Home | My eOffers | Sign Out Angela D Jernigan



Federal Acquisition Service

Submit contract offers and contract modifications online

eOffer/eMod

Prepare your eOffer:

- ☒ Corporate Information
- ☒ Negotiators
- ☒ Goods/Services
- ☒ Solicitation Clauses
- ☒ Upload Documents
- ☒ Submit eOffer
- ☒ Complete ☐ Incomplete


Company Name: PROFESSIONAL PERFORMANCE DEVELOPMENT GROUP, INC.

Solicitation Number: TFTP-MC-000874-B Refresh# 12 | [View PDF](#)

SUCCESS

Your eOffer was successfully submitted.

Email Confirmation

	OrsEofferAutoGen@gsa.gov	To	angela.jernigan@gsa.gov
	02/15/2007 10:26 AM	cc	
		bcc	
		Subject	Eoffer receipt notification . (Atten – Email inteneded for QA and testing Env.)

This is to notify you that your eOffer submitted againstTFTP-MC-000874-B for 874 has been received in Management Services Acquisition Center (10FT) on 02/15/2007.

Contact Information

- Kellie Stoker – 817-850-8203 / kellie.stoker@gsa.gov
- Margaret Lynch – Section Chief - 817-850-8130 / margaret.lynch@gsa.gov
- Brenda McCall – Lead CO – 817-850-8112 / brenda.mccall@gsa.gov

Questions????

Solicitation Download Instructions

- To access the Schedule 84 Solicitation follow this link:

<http://www.gsaelibrary.gsa.gov/ElibMain/scheduleSummary.do?scheduleNumber=84>

Then click on the blue box in the upper left that says "Vendors - Click here to view the solicitation on FedBizOpps"

Solicitation Download Instructions

- Once at the solicitation page on FedBizOpps, click on the "Packages" Tab.
- You will want to start out reviewing the Critical Information Specific to Schedule 84 and Schedule 84 - FSC 63 - Technical Requirements documents. Then you'll want to review the Solicitation and Clauses Incorporated by Reference documents as well as the Information and Instruction to Offerors.

Solicitation Download Instructions

- Since you are submitting under the ESPC SIN (246-53), you don't need to worry about submitting the Open Ratings Report, the Pathways to Success Training, the Readiness Assessment, prior and current Financial Records.