

## 2. GENERAL BEST PRACTICES

- 2.1 Teamwork is critical to ESPC success.
  - 2.1.1 Designate a project champion who will, along with the agency Contracting Officer (CO), lead the agency team's efforts. The project champion should ensure that team members are trained and stakeholders and decision makers are educated about the project. A committed project champion is a key factor in the success of the project, paving the path forward and building agency support for the project.
  - 2.1.2 Enlist the support of site/agency management. Keep management fully briefed, and make sure their questions and concerns are addressed throughout project development.
- 2.2 FEMP provides vital support. Use FEMP ESPC experts and training to your best advantage.
  - 2.2.1 Start with a FEMP Federal Financing Specialist (FFS). The FFS will guide the agency's first steps in the project, help with educating agency stakeholders, and coordinate ESPC training and other FEMP services for the agency team.
  - 2.2.2 Consult your FEMP experts before issues become problems – the FFS and your FEMP-qualified Project Facilitator (required for projects under the DOE master ESPCs). The Contracting Officer (CO) and Contracting Officer's Representative (COR) for the DOE IDIQ ESPCs, who are based at the DOE Golden Field Office, also provide support (send questions to [femp@go.doe.gov](mailto:femp@go.doe.gov)). Experts based at the national labs are made available through the FFS to support projects and especially implementation of advanced technologies.
  - 2.2.3 Training. The agency ESPC team must be knowledgeable about the DOE IDIQ contracts and the ESPC process in order to expedite development of a high-value project. To obtain ESPC training, use FEMP's free live ESPC workshops and on-demand webinars. The FFS helps agencies arrange on-site ESPC training for agency acquisition teams, or to promptly arrange training for new project team members.
- 2.3 To prevent delays, maintain continuity and documentation.
  - 2.3.1 Prepare for personnel turnover by documenting the project process and agency decisions.
  - 2.3.2 Understand that documentation can be critical to clarifying the intent of the contract after time passes.
  - 2.3.3 Documentation of project development and communication between the agency and the ESCO should be included in contract files. Include all pre-award communications such as PA and IGA development notes, proposal questions, responses, and resolutions, and other direction and agreements gathered by the CO and COR.

- 2.4 Keep the ESCO and Agency on the same page to avoid delays, unintended outcomes, and backtracking.
  - 2.4.1 Provide the ESCO with a checklist and roadmap that describes the agency approval process. Have the ESCO, with agency input, create a milestone chart that displays the proposed contract timeline and due dates. Using a contract timeline with a proposed date for task order award enables the ESCO to plan for allocating ample resources to meet the target date. A schedule also keeps the agency team focused on meeting the goal.
  - 2.4.2 Schedule at least bi-weekly phone or in-person ESCO–agency meetings to provide status updates throughout the entire ESPC process. The goal is to establish a running dialogue between all stakeholders, regularly facilitate complete and open exchange of information, and avoid delays and unintended outcomes.