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## APPENDIX C-10: State Program Guidelines Template



# Energy Savings Performance Contracting (ESPC)

## Program Guidelines for State Name Market Sectors

Program Name

State Energy Office Name

Date

**LOGO**

## How to Use This Document

Many states have developed guidelines for their ESPC programs. The guidelines are posted on their websites and used as a master program resource.

Below is a template designed to help states easily develop guidelines for a specific ESPC program. It includes key text and references as well as placeholders for the marketing plan, customized model documents, program requirements, state legislation, and other core program materials. Generic text is provided and is intended to be customized.

The template draws from the **Energy Savings Performance Contracting Guidelines for Developing, Staffing, and Overseeing a State Program**, developed in 2012 by the Technical Assistance Program of the U.S. Department of Energy – Energy Efficiency and Renewable Energy. It serves as a continued resource of customizable material.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Appendix C-9: Program Guidelines of States for examples. *This provides links to program guidelines developed by states including Connecticut, Florida, Georgia, Hawaii, and others.*

## Terminology

Multiple terms are used in this document, the numerous appendices, other resources provided through links, and in the ESPC industry. Some are identified below:

**Owner, Facility Owner, Agency, End-User, and Institution** refer to the entities you assist through your ESPC program.

**Energy Savings Performance Contract, ESPC, Energy Performance Contract, Performance Contracting and Guaranteed Energy Savings Agreement** are used synonymously.

**ESPC Field Representative, Technical Assistance Provider, Third Party Facilitator, and Owners Representative** are used synonymously except that the field representative has a less-involved role than the others in helping an owner through the ESPC process.



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Create your table of contents here.

# Energy Savings Performance Contracting Program

[State Name]

## Program Overview

The [State Energy Office Name] (State Energy Office Name) launched an Energy Savings Performance Contracting (ESPC) Program in [year] (year). Energy Savings Performance Contracting enables program participants to accomplish ESPC projects without using capital budgets, paying for projects through avoided costs. The Program was developed to increase the understanding and use of this approach, to provide a standardized process with clear direction and accountability for all participants, and to help ensure successful projects with results that can be measured and verified.

[Summarize information detailed below:]

The [State Energy Office Name] Program's specific goals are to [goal], and [goal]. The program provides resources and technical assistance to [entity] and [entity] in the state. The Program provides educational information, training sessions, and model procurement and contracting documents to help governments decide whether the ESPC is a good fit and to see them through the process of selecting a provider, developing a contract, and verifying the results.

## Program Goals

Program goals are to:

- Reduce energy use in state and local government buildings.
- Transform the market to establish performance contracting as a standard and accepted means to implement energy-saving projects.
- Develop comprehensive projects to achieve deep energy savings of 20–30% across all owner buildings.
- Provide streamlined pre-approved approaches to help decision makers more effectively follow-through with performance contracting projects to ensure success.
- Partner with associations, governments, and utilities to leverage their existing relationships and communication avenues to educate target audiences about performance contracting.
- Inform and influence as many stakeholders as possible in the state to be more efficient and productive, and to free up money for other important investments.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 2.1, Appendix B-1: Program Goals and Services  
*This lists many specific ESPC program goals and associated services to achieve the goals.*

## Program Authority (or Role of the State Energy Office)

The role of the \_\_\_\_\_ (State Energy Office) in developing this program is to provide information, education and technical assistance to support other agencies and \_\_\_\_\_.

Include the role of other agencies as relevant, such as the state public works department.

**Legislation:** Your state's legislation may direct certain agencies to oversee program activities or to develop administrative procedures. If this is the case, describe that role and cite the reference here. Find your state's legislation at: [State Legislation on ESPC \(http://mojo.energyservicescoalition.org/resources/state-legislation\)](http://mojo.energyservicescoalition.org/resources/state-legislation) (this may not be up-to-date, so also search for current statutes).

**Executive Order:** Likewise, an executive order may direct a state body to develop such a program.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 2.2: Who Should Develop an ESPC Program?

## Program Participants

The program serves the following sectors:

- State agencies
- Higher education institutions
- Public K-12 school districts
- Cities
- Counties
- Other state or local governments

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 2.3: Who Does an ESPC Program Serve?

## Program Services

The Program is providing a variety of services to aid the above participants in the process, including: education on the ESPC approach, pre-qualified ESCOs to streamline the procurement process and ensure qualified providers, an established process, approved contract documents to customize for a specific project, and direct technical assistance from ESPC experts under contract to the Program.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 2.1: Why Consider an ESPC Program?  
*This presents high-level goals and services.*
  - Section 2.4: What Does an ESPC Program Do?  
*This presents best practices and program services.*
  - Which States Have ESPC Programs?  
*This presents approaches and successes of other state programs.*

## Potential Results

The state has the opportunity to develop projects of about \$100 per capita in state and local governments, based on successes of other states with well-developed programs. This opportunity amounts to \$\_\_\_\_\_ in this state. The true opportunity of energy-saving projects in these sectors is far greater, and the resulting cost savings can be used to support comprehensive ESPC projects.

### PROGRAM RESOURCES

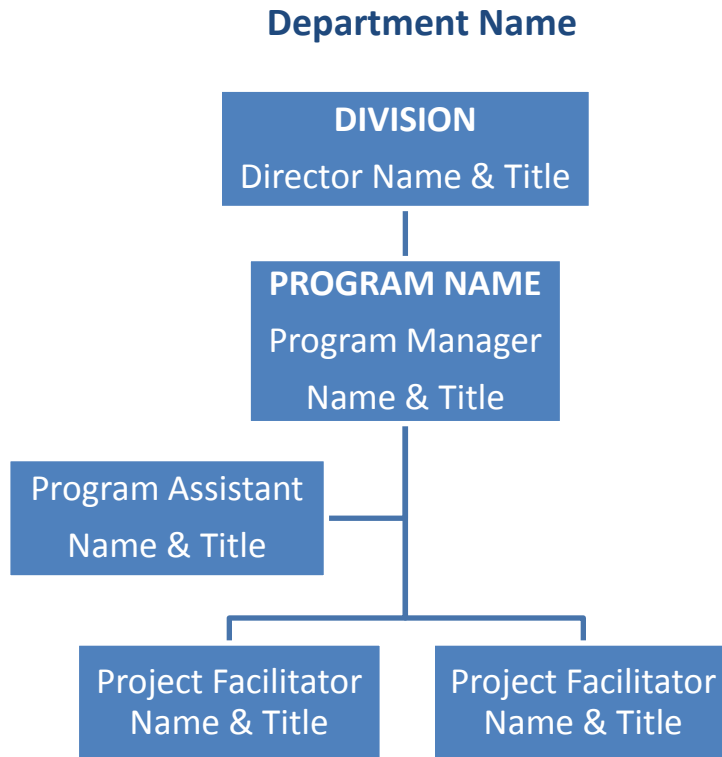
- U.S. DOE ESPC Guidelines, Section 2.9: How Can the Success of a Program Be Measured?

### Organizational Structure

The Program’s organizational structure is shown in the figure below:

**Tip:** Use Microsoft Word’s SmartArt tool to re-structure the chart below (click on the structure, then right click to see options).

**Figure 1: Program’s Organizational Structure**



### Staff

Key staff members and their roles are described below.

Program Manager:

Program Field Representatives (Project Facilitators):

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 2.7: How Can an ESPC Program be Staffed?  
*This includes task descriptions of a program manager and program assistant.*

## Program Funding

Describe the source of program funding and discuss the options or barriers for establishing a self-funded program.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines:
  - Section 2.8.1: Scaling an ESPC Program Based on Funding Levels
  - Section 2.8.2: Building a Self-Funded Program  
*This section presents a self-funded strategy to assess owner fees to support program costs.*

## ESPC Program Best Practices

The following set of best practices was developed through funding by the U.S. Department of Energy by the Energy Services Coalition. The best practices are recommended for states to consider in developing and implementing a statewide Energy Savings Performance Contracting (ESPC) Program.

The Program is adopting many of the nationally recognized best practices for programs, provided they are feasible and a good fit with the program’s goals, as indicated in the checklist below.

| Program Status | Best Practice                                | Description  |
|----------------|--|--|
| X              | State Leadership                             | Establish the state (state energy office) as the source for information on energy performance contracting. Establish savings requirements for state buildings and stipulate that ESPC can be used to meet the requirement. |
|                | Strong Legislative and Gubernatorial Support | Utilize legislative and gubernatorial powers to establish ESPC as a priority for the state agenda  |
|                | Consensus Support for State Decision-makers  | Establish consensus support among key state decision-makers (legal, procurement, finance)  |
|                | Public/Private Partnership                   | Establish a stakeholder group  |
|                | Pre-qualified ESCOs                          | Pre-qualify ESCOs  |
|                | Pre-approved Contracts                       | Obtain state attorney pre-approval of model contracts  |
|                | Project Oversight and Technical Assistance   | Ongoing support to facility owners’ ESPC projects  |
|                | Education and Outreach                       | Educate potential end-users in performance contracting processes and benefits  |
|                | Program Funding Strategies                   | Implement a fee-based technical assistance service such that the fees sustain the cost of the program  |
|                | Data Collection and Project Tracking         | Establish simple tracking guidelines for projects and the program to demonstrate program success through measurable results  |



## **PROGRAM RESOURCES**

- U.S. DOE ESPC Guidelines, Section 2.4: What Does an ESPC program Do?

## **Measuring Success**

The following data and metrics will be used to monitor the program's success:

- The total dollar value of ESPC projects initiated divided by the cumulative program costs.
- Detailed project information: project name, cost (excluding financing costs), projected guaranteed cost savings, list of measures, square footage, number of buildings, units of energy saved (converted to BTUs), dates/years of critical stages (RFP issued, audit contract executed, performance contract executed, construction completion, measurement and verification reports), actual cost savings achieved.
- Program sum of projects served: sum of costs, sum of guaranteed savings, sum of energy cost savings, sum of energy units (converted to BTUs), number of owners served (total and broken down by sector).

## **PROGRAM RESOURCES**

- U.S. DOE ESPC Guidelines, Section 2.9: How Can the Success of a Program be measured?

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## ENERGY SAVINGS PERFORMANCE CONTRACTING (ESPC)

Insert the ESPC overview from Section 1 of the *Guidelines*. Customize this section for your state.

## EDUCATION AND OUTREACH

### Marketing Plan

The program developed a marketing plan. Key elements are presented below. (Only summarize key elements here if this document is to be posted. If this document will remain internal, post the entire marketing plan.)

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Chapter 3: Build a Marketing Plan, Define the Audience, Craft the Message.

### Leveraging Resources

Following are the key associations and organizations that the program will engage to help reach target audiences and involve as stakeholders in a public/private partnership forum.

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 3.4: Leverage Resources  
*This section includes a list of many national associations and organizations that may have local or state chapters.*

### ESPC Educational Information

The following materials were developed or will be developed, distributed, and posted on the program's website:

- Program website:
- Appendix C-7: Slideshow – What is ESPC and How Does it Work?
- Appendix C-8: Handout – 5 Steps to Successful Energy Savings Performance Contracting
- Appendix C-11: Handout – What is ESPC?

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 3.5: Reach the Audience  
*This section includes some pre-developed customizable materials.*

### Outreach Activities

The following activities are planned:

- Workshops
- Phone conferences
- Training sessions

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 3.5: Reach the Audience  
*This section includes some pre-developed customizable materials.*

## PROCESS AND DOCUMENTS

### Legislation

Legislation defines how ESPC can be conducted in [REDACTED] (sector). Following is a summary of key components of the legislation. The appendix includes a copy of the statutes.

Summary of Statute # [REDACTED] for [REDACTED] (sector):

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 4.1: Legislation
- [State Legislation on ESPC](#)  
*This document provides quick links to statutes in each state. It was developed by U.S. DOE in 2013.*  
([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html))
- [Model State Legislation](#)  
*ESC and NAESCO developed Model State Legislation documentation, with funding from U.S. DOE.*  
([http://energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice02/Model\\_EPC\\_Legislation.pdf](http://energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice02/Model_EPC_Legislation.pdf))

### Consensus

Following is a description of staff members involved in developing consensus to establish the model documents.

#### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 4.2: Consensus  
*This describes a suggested process for developing consensus in establishing approved processes for procurement and contracting.*

### Model Documents

The program customized the model documents over the years, starting with a few pioneering states in the 1980s, then being transformed and improved by other states, and continuing in that way to this day. The Energy Services Coalition (ESC), through U.S. Department of Energy (U.S. DOE) funding, captured a model set of documents a decade ago and they became the default standard for states to use as a downloadable template. U.S. DOE recently conducted a round of updates and posted the updated documents at the U.S. DOE Solutions Center ([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html)).

The documents were refined to represent the [REDACTED] (state) requirements and program interests. They represent best practices for facility owners to develop ESPC projects. The documents are intended to be customizable to meet the needs of any owner.

## OWNER MEMORANDUM OF UNDERSTANDING

A Memorandum of Understanding (MOU) between the program and owners defines clear requirements and guidelines for a participating owner, and establishes the program's authority. This aids the program in making commitments to provide technical assistance.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.1: Owner Memorandum of Understanding  
*This provides more detail on this step.*
  - Appendix D-1: At-A-Glance – Owner Memorandum of Understanding (MOU)  
*This briefly describes each segment of the model document.*
- [Owner Memorandum of Understanding](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html) (Facility Owner's Memorandum of Understanding)  
*(http://www1.eere.energy.gov/wip/solutioncenter/performance\_contracting.html)*  
*This document presents the roles and responsibilities of the program and the owner, and was initially developed by the State of Wyoming.*

## RFP TO SELECT AN ESCO

A process to pre-qualify ESCOs is pending. Until that time, an individual RFP is needed for each owner.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines, Section 4.3.2: RFP to Select an ESCO  
*This provides more detail on this process step.*
- [RFP for Facility Owner to Select an ESCO \(single use\)](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html)  
*(http://www1.eere.energy.gov/wip/solutioncenter/performance\_contracting.html)*  
*This RFP is used by owners to competitively select an ESCO for a specific project.*

## RFQ TO PRE-QUALIFY ESCOs

ESCOs were (or will be) pre-qualified through a Request for Qualifications (RFQ) and will be eligible to provide services to owners that choose to participate in the ESPC Program. An ESCO list is posted on the program website: [\[REDACTED\]](#).

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.3: RFP to Pre-Qualify ESCOs  
*This provides more detail on this process step.*
  - Appendix D-2: At-A-Glance – RFP to Pre-Qualify ESCOs  
*This briefly describes each segment of the model document along with negotiating items and recommendations for developing an RFP for your state.*

- [Model RFQ to Pre-Qualify ESCOs](#) with evaluation forms.  
*This RFQ is used by a program to pre-qualify ESCOs.*  
([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html))

## FINAL ESCO SELECTION PROCESS

ESCOs were pre-qualified to provide performance contracting services to program participants. This secondary selection process establishes how an owner can competitively select an ESCO from the pre-qualified pool to meet the needs of the specific project.

The process was developed to follow state procurement rules. A city or school district will need to apply its own procurement rules.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.3.1: Final ESCO Selection Process  
*This provides more detail about this process step.*  
  
Appendix D-3: At-A-Glance – Final ESCO Selection  
*This briefly describes each segment and clause of the model document along with negotiating items and recommendations for developing a final selection process for your state.*
- [Secondary/final selection process](#) and evaluation forms  
([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html))  
*This process and form suggests an RFP is used for an owner to draw from the pre-qualified list of ESCOs to make a final competitive selection.*

## ESCO BASE CONTRACT FOR PRE-QUALIFIED ESCOS

The program holds a contract with each ESCO that establishes guidelines they must follow to remain pre-qualified.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.3.2: ESCO Base Contract for Pre-Qualified ESCOs  
*This provides more detail on this step.*
  - Appendix D-4: At-A-Glance – ESCO Base Contract (Contract for Pre-Qualified ESCOs)  
*This briefly describes each segment and clause of the model document along with negotiating items and recommendations for developing an ESCO Base Contract for your state.*
- [ESCO Base Contract](#)  
([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html))  
*This sample contract establishes roles and requirements for pre-qualified ESCOs participating in the state's program.*

## INVESTMENT GRADE AUDIT AND PROJECT PROPOSAL CONTRACT

This contract for Investment Grade Audit & Project Proposal is the first of two contracts to develop a project with the selected ESCO. The ESCO will complete an Investment Grade Audit to identify and evaluate each potential cost-saving measure with projected energy cost savings and itemized project costs. A measurement and verification plan will be developed at this time to establish how efficiency savings will be verified for each measure. A project proposal will present aggregated measures that can be financed through guaranteed efficiency savings with a projected cash-flow over the financing term. The results of the audit will form the basis for negotiating the Energy Savings Performance Contract to implement the project.

The program developed a model document for use in the state.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.4: Investment Grade Audit and Project Proposal Contract  
*This provides more detail on this step.*
  - Appendix D-5: At-A-Glance – Investment Grade Audit (IGA) and Project Proposal Contract. *This briefly describes each segment and clause of the model document along with negotiating items and recommendations for developing an Investment Grade Audit contract for your state.*
  
- Technical Energy Audit and Project Proposal (Investment Grade Audit Contract) ([http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html))  
*This document includes the terms of payment and a detailed scope of work.*

## ENERGY SAVINGS PERFORMANCE CONTRACT

The Energy Savings Performance Contract, sometimes referred to as the Implementation Contract, follows satisfactory completion of the Investment Grade Audit Contract to implement the negotiated projects. The Energy Savings Performance Contract defines the final agreed upon scope of work, the guarantee, and how efficiency savings will be verified, as well as all associated costs and mutual responsibilities between the ESCO and the owner. The contract also includes the improvement measures, the associated equipment and labor costs, and all guaranteed energy and maintenance efficiency savings, as well as a construction schedule, design parameters, equipment specifications and warranties, and maintenance requirements.

This model contract was customized for use in the state, including legislative requirements and recommendations, as well as changes from discussions with the legal department and the state buildings authority, to meet the needs of the state program and users.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.5: Energy Savings Performance Contract  
*This provides more detail on this step.*
  - Appendix D-6: At-A-Glance – Energy Savings Performance Contract

*This briefly describes each segment and clause of the model document along with negotiating items and recommendations for developing an Energy Savings Performance Contract document for your state.*

- Energy Performance Contract  
[http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html)  
*This document addresses all aspects of a performance contract including schedules and appendices to define the project, how savings will be measured, and roles and responsibilities of the ESCO and the owner.*

## FINANCING SOLICITATION PACKAGE

The financing agreement is a stand-alone agreement, separate from the Energy Savings Performance Contract, between the owner and a financial organization and signed by the owner concurrently with the performance contract. The two agreements are linked through the payment schedules and the ESCO savings guarantee for annual efficiency savings and projected costs to meet or exceed the annual finance payments (plus any other related expenses imposed by the performance contract such as monitoring and verification).

Financing can be accomplished in a number of ways, including using the owner's internal financing processes, using the financing partner the ESCO brings in, through the use of bonds or other funding sources, or through a combination of sources. Financing is typically provided by a financial organization which specializes, or has experience, in performance contracting projects. The financing instrument is typically a tax-exempt, municipal lease-purchase agreement as this instrument delivers the lowest finance rates.

The Financing Solicitation Package is one option if financing isn't otherwise arranged. It enables and authorizes the ESCO to seek competitive financing on behalf of the owner. This arrangement meets the need for competitive procurement of financing, eliminates the owner's need to issue a separate RFP for financing, and positions financing as an integral part of the performance contracting approach, putting the burden of the solicitation process on the ESCO. The ESCO can provide the necessary information to solicit competitive rates from financial institutions. Then the ESCO can evaluate the full package of rates and services from each financial institution and recommend the best package for the institution's consideration and final decision.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines
  - Section 4.3.6: Financing Solicitation Package  
*This section provides more detail on this step.*
  - Appendix D-7: At-A-Glance – Financing Solicitation Package  
*This document briefly describes each segment and clause of the model document along with negotiating items and recommendations for developing a Financing Solicitation Package for your state.*
- Finance Solicitation Package  
[http://www1.eere.energy.gov/wip/solutioncenter/performance\\_contracting.html](http://www1.eere.energy.gov/wip/solutioncenter/performance_contracting.html)  
*This includes an RFP to competitively select a financing company and protocols to include in a lease agreement.*



## OVERSEEING A PROJECT

ESPC involves numerous individual projects under one contract, a very high overall cost (often millions of dollars), and a number of processes involving various specialists (procurement and contracting, project management, financing, efficiency savings verification, long-term maintenance), as well as multiple years of measurement and verification to monitor the performance guarantee. ESPC is also a comprehensive approach involving most of an owner's building portfolio and addressing most electrical, plumbing, and controls systems. The majority of owners will only undergo the process once, so it may not be beneficial for a staff person to climb the steep learning curve. For these reasons, state programs offer direct technical assistance from ESPC experts to guide owners through the process to ensure project success.

Include steps from the following resources that you intend to follow.

### PROGRAM RESOURCES

- U.S. DOE ESPC Guidelines: Chapter 5 - Overseeing A Project  
*This chapter provides extensive detail and many resources for overseeing a project as outlined below.*
- Owner Memorandum of Understanding
  - U.S. DOE ESPC Guidelines
    - Section 4.3.1: Owner Memorandum of Understanding Process  
*This section presents more details on this step.*
    - Section 5: Overseeing A Project, 5.1: Owner Memorandum of Understanding  
*This section presents more details on this step.*
  - [Colorado's Standards for Success](http://www.colorado.gov)  
<http://www.colorado.gov>  
*This document is an alternative to the MOU – a listing of roles and expectations without a formal signature required.*
- Technical Assistance Services
  - U.S. DOE ESPC Guidelines
    - Appendix E-1: Technical Assistance Tasks for Field Representatives (Median-Cost Option)  
*This document is an outline of technical assistance tasks that a program could consider providing through Field Representatives to assist owners through the process, including the number of hours for each service (median-cost option).*
    - Appendix E-2: Sample RFP and Contract to Solicit Field Representatives (Project Facilitators)  
*This RFP could be used by the Program to hire one or more Project Facilitators to serve the Program's owners, or it can be used for an Owner to solicit a Project Facilitator for the Owner's project.*
    - Appendix B-3: RFP and Contract for Project Facilitators

*This document is a sample RFP and contract for a self-funded program or an owner to contract with Project Facilitators to provide technical assistance on a project. This was adapted from the RFP issued in 2012 by the State of Louisiana's Department of Administration.*

- Appendix E-3: Project Screening  
*This document contains a detailed list of items to consider when assessing an owner's potential for technical assistance.*
- Appendix E-4: Sample Feasibility Study  
*This document is a template for developing a feasibility study including text and suggestions for what to include.*
- Project Oversight
  - U.S. DOE ESPC Guidelines
    - Appendix E-5: Project Tracking Log  
*This document is a template format for logging owner communications overtime.*
    - Appendix E-6: Technical Assistance Checklist  
*This document is a checklist for Field Representatives to track each critical step for technical assistance, adapted from the State of Colorado.*
    - [State Project Data Collection Form](http://www.energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice10/Project_Data.xls)  
[\(\[http://www.energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice10/Project\\\_Data.xls\]\(http://www.energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice10/Project\_Data.xls\)\)](http://www.energyservicescoalition.org/Data/Sites/1/documents/resources/tools/practice10/Project_Data.xls)  
*This spreadsheet was developed by the Energy Services Coalition for project tracking purposes.*

## APPENDICES

### **Marketing Plan**

*Insert your program's marketing plan here.*

### **Legislation**

*Insert your state's ESPC-related legislation here.*

### **Model Documents**

*Insert your state's ESPC-related model documents here.*