**U.s. Department of Energy**

**Federal Energy Management Program**

**ESPC ENABLE *Request for   
Quote/*Notice of Opportunity Template**

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***PLEASE READ THIS GUIDE BEFORE USING TEMPLATE***

**ESPC ENABLE Request for Quote/Notice of Opportunity Guide**

**Introduction:** This template is a tool to assist you in forming and issuing your agency’s Request for Quote/Notice of Opportunity (subsequently referred to as NOO) for an ESPC ENABLE project. The NOO is the formal initiation of the ESPC ENABLE project, notifying the ESCOs of a specific project opportunity.

The NOO provides ESCOs with information about your perspective project and requires them to submit a response (see **02 Attachment 2 - ESCO Expression of Interest Form**) within a specified timeframe. You will evaluate these proposals based on the criteria outlined in your NOO using the **03 ESCO Evaluation Worksheet** to make a selection.

**Instructions:** The ESPC ENABLE NOO will be developed and issued by the Contracting Officer (CO). The NOO Template begins on the next page. Please remove this page before completing your NOO.

This template ***cannot be used without editing***. In the template, you will find two types of text. [Sample text will appear in black font.] Please review the [sample text] to ensure that it meets your agency specific requirements and project goals when using it in your NOO. [Text that requires you to insert agency- or project-specific information, or requires you to edit for your purposes, will appear in red font.] You should be sure to reformat this document to fit your particular agency’s formatting requirements for procurement documents.

**ESPC ENABLE Request for Quote/Notice of Opportunity Template**

TO: All GSA Supply Schedule 84, Special Item Number (SIN) 246-53 Contractors

FROM: (Insert Contracting Officers name and address)

DATE: (Insert date NOO is issued)

SUBJECT Request for Quote/Notice of Opportunity (NOO) for an ESPC ENABLE Energy Project

The (Agency/Sub-agency/Location/Site) invites current GSA Supply Schedule 84 contract holders under Special Item Number (SIN) 246-53 to submit a written response using the provided template (**Attachment 2 - ESCO Expression of Interest Form**) for the opportunity to be considered for this potential project. The (Agency/Sub-agency/Location/Site) is interested in upgrading/installing equipment related to the following systems: lighting; water; heating, ventilation, and cooling (HVAC); simple HVAC controls; and solar photovoltaic (PV). (If more detailed information is available, please insert here i.e. “replacing exterior lighting with LED technology.”) Information and data for the facilities considered is available in **Attachment 1 – Facilities and Energy Data**. The response is not to exceed ten (10) pages including attachments.

To respond to this NOO, you must be qualified under GSA Schedule 84, SIN 246-53 **and** be on the Department of Energy’s Qualified ESCO list. Additionally, ESCOs should have experience implementing upgrades to/installing lighting, water fixtures, simple HVAC controls, HVAC equipment, and solar PV systems.

The (Agency/sub-agency/Site) will select one ESCO from responses to the NOO to conduct an Investment Grade Audit (IGA) of the facility using the standard tools provided by the Department of Energy’s Federal Energy Management Program (FEMP). The cost of the IGA will be included in the final price of the ESPC ENABLE project. Using the results of the IGA, the ESCO will prepare a Final Proposal (FP) based on the FEMP ESPC ENABLE **Final Proposal Requirements** (see attachment 3). Both the IGA and FP should adhere to the general conditions of the GSA Schedule 84, SIN 246-53, and the ESPC ENABLE **06 Scope of Work (SOW)**. The SOW will be provided to the selected contractor prior to the IGA. The agency will not be responsible for any costs incurred, such as proposal preparation costs or the costs incurred in conducting the IGA, unless a TO is awarded or authorized by the agency CO.

If selected, the ESCO shall be required to report final project data to FEMP including, but not limited to, implemented energy conservation measures, total project investment, contract price, contract term, award date, completion date, guaranteed cost savings, and total energy savings.

**Each ESCO response must address the following:**

* ESCO Qualifications and Past Performance
* Price Component
* Other (Insert any additional requirements for ESCO responses you deem necessary. Some examples are environmental concerns, experience working with small businesses and/or local sub-contractors, experience dealing with hazardous materials, etc. Please remember the 10 page maximum above. Also, if you add additional items to this list, they should be reflected in your evaluation criteria [below])

The selection process will be based on the ESCO’s qualifications and a price component in accordance with the best value criteria defined by FAR 2.101. The criteria will be weighted (equally/of descending importance/based on the following values [insert specific weights]):

* **ESCO Qualifications and Past Performance:** To what extent did the contractor demonstrate compliance with similar work and scope? Also, what was the contractor’s performance with prior contract requirements (i.e. accurate reporting, timely delivery, on-cost delivery and technical excellence)?
* **Price Component:** an estimated price to perform the IGA and prepare the FP, quoted on a dollars per square foot basis, and a total for all facilities in question.
* (Insert additional evaluations criteria as appropriate)

The timeline for this selection process is as follows:

* Closing date for expression of interest:  Two weeks from today (or another timeline specified in your acquisition plan)
* Agency’s review process: (Indicate end date for review process, recommend no more than one week)
* Date for notification to unsuccessful offerors: One week from Expression of Interest Submission
* Unsuccessful offer debrief opportunity: 5 business days
* Date for notification and discussions with successful offeror:  One week from Expression of ESCO Interest Submission

**Attachments:**

1 - Facilities and Energy Data

2 - ESCO Expression of Interest form

3 - Final Proposal Requirements

4 - ESPC ENABLE Financial Data Template

# 02 Attachment 1 – FACILITIES AND ENERGY DATA

The facilities’ physical location and data represent the potential project and known energy consumption. The location and data do not represent the final project that may be identified as the result of the selected ESCO’s Investment Grade Audit. The agency reserves the right to consider viable energy conservation measures.

(Provide facility and energy data in the tables below for all sites considered. Or, if you have your own tables or format for the information below please attach it. The facility information is just for example please remove it prior to use.)

## Facility Data

| [**Location**](#Instruct_Buildings) | [**Number of buildings**](#Instruct_NumberofBuildings) | **Building Size** | [**Mission/Comment**](#Instruct_buildingmission) | [**Existing Facility Conditions**](#Instruct_buildingmission) |
| --- | --- | --- | --- | --- |
| List the major project site | Identify the total number of buildings | List the estimated total building size (in square feet) for each project site. | Indicate the project site(s)’ primary mission and any useful information to assist the ESCOs in responding to the NOO | Describe the project site(s) current condition and the age of the sites(s). Include a list of existing equipment. |
| XYZ Park, San Francisco, CA | 10 | 10 buildings ranging from 100 sq. ft. to 20,000 sq. ft. in size. Approx. 45,000 sq. ft. in total | The buildings are a mixture of administrative offices, warehouses and a visitor’s center. | All buildings circa 1960 with very limited upgrades since. Possible asbestos. |

## Energy Data (May use Agency Annual Report as a data source \*\* Please use the most recent year’s data whenever possible)

|  | **Energy Rate $** | [**Energy Units**](#Instruct_EnergyUnits) | [**Annual Total Use**](#Instruct_AnnualEnergyUse) | [**Annual Unit of Measure**](#Instruct_AnnualUnits) | [**Total Annual Cost**](#Instruct_AnnualEnergyCost) |
| --- | --- | --- | --- | --- | --- |
| **Electricity** |  | Choose units |  | Choose units |  |
| **Natural Gas** |  | Choose units |  | Choose units |  |
| **Water** |  | Choose units |  | Choose units |  |
| **Other** |  | Choose units |  | Choose units |  |
| **Total Annual Cost** |  | | | |  |
| **Average monthly peak electricity demand (kW):** | | | | | |

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# 02 Attachment 2 - ESCO EXPRESSION OF INTEREST

(This form must be included as an attachment to 02 Notice of Opportunity Template, along with 02 Attachment 1- Facilities and Energy Data. ESCOs are required to submit their responses to the NOO within one week using this form. The response is not to exceed 10 pages including attachments. **Please ensure that the roman numerals below match the submission requirements you outlined in the NOO**)

**ESCO EXPRESSION OF INTEREST Template**

(Insert company name)

Address 1

Address 2

City, State Zip Code

Dear (Insert Agency name):

In response to your Request for Quote/Notice of Opportunity (NOO), (insert ESCO name) would like to execute an Investment Grade Audit (IGA) and develop an ESPC ENABLE project at the (Insert project location[s]).

| **Facilities & Locations** | **Site Point of Contact** | **ECMs** | **Project Investment** | **Guaranteed Savings** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. ESCO Qualifications & Past Performance
2. Price Component
3. Other (if applicable)

Primary and Secondary Company Contacts

|  |  |
| --- | --- |
| Name of primary contact  Location  Mailing address  Phone number  Email address | Name of Secondary contact  Location  Mailing address  Phone number  Email address |

# 02 Attachment 3 – Final proposal requirements

**Final Proposal Requirements**

**A. Project Overview (length: 2 pages max)**

1. Executive Summary - As a minimum, a narrative description of the project summarizing the ECMs, the energy, water, and related cost savings, implementation price and financial summary.

2. Site Description and Utility Summary - For the site, the contractor shall submit narrative information for items, as applicable, in the format specified below:

a. Site Description *may* include:

i. Overview, size, location, etc.

ii. Description of mission/commands/agencies on the site, general operations, occupancy.

iii. Map of site showing major areas/designations.

iv. Building/facility list, name /number, type of facility, square footage, hours of operation.

vii. Facility descriptions (for those buildings included in the ESPC). General description of building condition and operations including overview of energy (mechanical/electrical) and water systems.

b. Utility Summary

i. Overview/description of current utility systems on site: electrical, natural gas, fuel oils, water, sewer, etc. Include site diagrams/maps, as available.

ii. Description of metering systems for each utility.

* Utility/revenue meters.
* Sub-meters, advanced metering systems, as applicable.

**B. Volume I - Technical Proposal (length: see sub-sections)**

1. ECM description (length: 3 pages max per ECM) - For each ECM proposed, the contractor shall submit narrative information for items as applicable, in the format specified below:

a. ECM description (existing conditions, proposed upgrades)

b Location affected

c. Energy baseline

d. ECM projected energy use and cost

e. Proposed equipment identification including manufacturer, model number and optional equipment proposed for each ECM component. (may be presented as appendices and excluded from page limit)

f. ECM project schedule – Provide a detailed project schedule to include the duration of the following key phases:

i. Equipment procurement/lead time (i.e., date required to acquire equipment and delivery on-site)

ii. Installation, commissioning, post-installation M&V and post installation report

iii. Project acceptance

2. ECM Performance Measurement (FEMP TEMPLATE, length: pre-defined by FEMP provided template)

a. The M&V plan shall be completed using the provided FEMP ENABLE **08\_M&V Plan Template**.

b. ECM Commissioning Approach – The contractor shall prepare an ECM Commissioning Approach for each of the proposed ECMs based on the FEMP ENABLE **09\_Project Commissioning & Acceptance Guide and Checklist**.

3. Management Approach (length: 2 pages max)

a. Organization -Show the organization for implementing and managing the TO project through the use of an organizational chart. The proposed organization shall contain the responsibilities of each element shown on the organization chart. Identify personnel integral to the performance of the ESPC project, by name within each element. Show the lines of authority within the organization. If portions of the project are to be subcontracted (e.g., installation of an energy conservation system), identify the subcontracted function, and which element of the contractor’s organization will manage the subcontract(s).

**C. Volume II - Price Proposal** - The selected contractor shall complete financial Schedules 1, 2, 3, 4 (populated by results from FEMP ENABLE IGA Audit Tool) and 5 and shall provide supporting documentation listed below. The Schedules can be found in **Attachment 4 – ESPC ENABLE Financial Data Template** of this document. The contractor is required to submit project-level financial and energy-savings information into the eProject Builder (ePB) online system, which will then generate the full set of Task Order financial schedules. The data requirements are specified in **Attachment 4 – ESPC ENABLE Financial Data Template** and on the ePB website and may be amended from time-to-time. Please see: <https://eprojectbuilder.lbl.gov>

1. In addition to the submission of TO schedules and supporting documents, the contractor shall provide information on how financing was competitively selected (desire is to solicit 3 bids).

**D. Individual Small Business Subcontracting Plan** – In the event the selected contractor meets the prescription of FAR 52.219-9, then the selected contractor shall prepare and submit the required document.