



SCEP
STATE & COMMUNITY ENERGY PROGRAMS

DOE Tools and Resources to Support ESPC in the MUSH Market

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Agenda

- **Locating DOE MUSH Market ESPC Resources**
- **Overview of Key Tools and Resources**
 - ESPC Toolkit
 - ESPC Model Documents
 - Owner's Representative Documents
 - PCNRC Training Certificate Series
 - eProject eXpress
 - ESPC Campaign
- **Get Started!**

Locating MUSH Market ESPC Resources

The U.S. Department of Energy (DOE) offers a wide variety of resources for stakeholders in the municipal and state governments, universities and colleges, schools, and hospitals (MUSH) market to support energy savings performance contracting (ESPC)

Office of State & Community Energy Programs (SCEP) State & Local Solution Center

Explore technical assistance tools and resources designed to help your organization reach its energy efficiency and renewable energy goals

Performance Contracting National Resource Center (PCNRC)

Access DOE's best practice resources and solutions for ESPC in the federal and MUSH markets

Better Buildings Solution Center

Find solutions shared by Better Buildings partners that helped bolster their bottom lines, advance technology innovation, create jobs, and spur energy efficiency investments

Office of State and Community Energy Programs

Works with a wide range of government, community, business and other stakeholders to:

- Significantly accelerate the deployment of clean energy infrastructure and technologies
- Catalyze local economic development and create jobs
- Reduce energy costs
- Avoid pollution through place-based strategies

SCEP provides cross-cutting technical assistance and works in partnership with states, local governments, K-12 school districts, and other stakeholders to:

➤ Convene **PEER EXCHANGES** to showcase replicable models

➤ Create **TOOLS AND SOLUTIONS** that address pervasive barriers

➤ Provide **TECHNICAL DATA AND INFORMATION** from leading experts

Goal: Maximize energy, cost savings and GHG emissions reductions



Performance Contracting National Resource Center (PCNRC)

- Established in 2020 at the direction of Congress as a hub for DOE's best practice resources and solutions for energy savings performance contracts (ESPCs)
 - Collaboration between the Federal Energy Management Program (FEMP) and the Office of State and Community Energy Programs (SCEP)
- Supports ESPC in the federal and MUSH markets
 - FEMP and SCEP established the PCNRC to expand the use of ESPC nationwide.
- Provides guides, tools, templates, and trainings focused on performance contracting & workforce development



Better Buildings Solution Center

Through the Better Buildings Initiative, DOE partners with leaders in the public and private sectors to make the nation's homes, commercial buildings, and industrial plants more energy-efficient by accelerating investment, sharing best practices, and profiling success

Types of Solutions

- **Implementation Models** offer a replicable solution on the steps taken across a project's planning, financing, process, and partnership phases
- **Showcase Projects** highlight innovative efforts that helped partners achieve 20% or more energy savings at a single building or facility
- **Solutions-at-a-Glance** focus on specific tools or processes developed to advance energy efficiency strategies
- **Other Resources** including webinars, presentations, fact sheets, technical reports, and toolkits offer education across many topics

Success to Date

- 900+ Partners
- \$15+ Billion saved
- \$28 Billion in financing extended
- 2.5 Quadrillion BTUs saved
- 3,000+ solutions available



ESPC Toolkit

The ESPC Toolkit is a collection of tools and resources that reflect best practices and innovative approaches that states, cities, and K-12 schools have used to successfully establish and implement performance contracting



- **Considering ESPC?**

- ESPC Fact Sheet
- ESPC or Design-Bid-Build for Your Retrofit?

- **Implementing ESPC Projects**

- ESPC Virtual Technical Assistant
- Financing Decision Tree

- **Establishing an ESPC Program**

- Guidelines for Establishing an ESPC Support Program
- State ESPC Program Examples

- **Expanding ESPC to New Markets**

- ESPC for Small Projects
- ESPC Primer for K-12 Schools
- ESPC Guide for Fleets and Fueling Infrastructure
- ESPC Guide for Water Resource Recovery Facilities

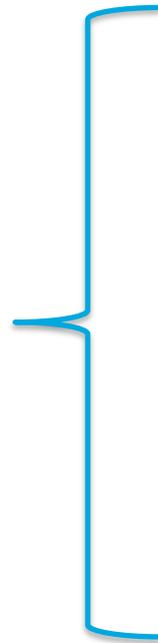
- **Evaluating ESPC Results**

- Understanding Your ESPC Savings Guarantee
- The Business Case for Applying M&V
- Strategies for Successful M&V
- Verifying Operating and Maintenance Savings

ESPC Model Documents

- Collection of procurement and contracting document templates that incorporate recommended best practices for MUSH market ESPCs
- Adaptable to meet state/local and customer requirements
- Standardize and streamline process and support delivery of successful projects

Update Underway
Incorporating
feedback from
ESCOs, State
Energy Offices, and
other MUSH users



Documents by Category	
Program Solicitation Documents	<ul style="list-style-type: none">• Program RFP to Pre-Qualify ESCOs• Program RFP - ESCO Response Template• ESCO Base Contract
Project Solicitation Documents	<ul style="list-style-type: none">• Project RFP• Project RFP - ESCO Response Template
Project Scoping and Contract Documents	<ul style="list-style-type: none">• Investment Grade Audit Contract• Energy Savings Performance Contract<ul style="list-style-type: none">• ESPC Schedules and Exhibits• ESPC Schedule C (M&V Plan) Example• ESPC Schedule T (Commissioning Plan) Example
Educational Supplements	<ul style="list-style-type: none">• Educational Companion to the ESPC• Financing Solicitation Guidance• M&V Plan Guidance

Owner's Representative Documents

- Third-party technical consultant provides vital expertise, delineates risks and responsibilities of both parties, and acts as a communication liaison between the customer and the ESCO
- [An Ally in Your Corner: Benefits of Using Owner's Representatives](#)
 - Describes the benefits of using an owner's representative (OR)
 - Outlines roles and responsibilities
 - Includes recommended areas of competency and qualifications
 - Resources for retaining an OR
- Model documents
 - ***Under development:*** template solicitation and contract documents to retain an OR

PCNRC Training Certificate Series

- Free, on-demand, accredited & interactive trainings
 - Developed by FEMP, in collaboration with SCEP, National Laboratories, DOE contractors, and experts in MUSH market ESPCs
- Created to support the build-out of a larger ESPC workforce
- Focuses on roles and responsibilities, particularly those of the Owner's Representative (OR), throughout the ESPC project cycle
- Earn continuing education units (CEUs) and a certificate

Benefits

- Describe how ESPCs are tools to achieve energy and cost savings, facility improvements, resilience and more

Process

- Understand the steps to plan, scope, implement, and verify the performance of an ESPC project

Risks and Best Practices

- Understand the activities that set the stage for successful ESPC projects, including the responsibilities of all actors

Technical Awareness

- Build familiarity with all tools, roles, resources, and applicable statutes necessary to facilitate a project

PCNRC Training Certificate Series

Module #	Title and Key Learning Objectives	
1	Overview of ESPCs <ul style="list-style-type: none">Identify the ESPC process and steps; Describe Owner's Representative's role	} Trainings Available Now
2	Getting Started with an ESPC Project <ul style="list-style-type: none">Identify financial, operational, and performance risks and responsibilities	
3	Developing Scope for Project and Request for Proposal (RFP) <ul style="list-style-type: none">Identify information, constraints, and resources to develop the project scope and RFP	
4	Measurement & Verification for ESPCs <ul style="list-style-type: none">Describe importance of M&V and how to choose an appropriate M&V option for each ECM	
5	Facilitating the Investment Grade Audit (IGA) <ul style="list-style-type: none">Understand the OR roles in facilitating the IGA and developing baselines	
6	Reviewing the IGA and Project Proposal <ul style="list-style-type: none">Explain allocation and mitigation of risk; Describe how to balance M&V costs and benefits	
7	Construction, Performance Verification, and Project Acceptance <ul style="list-style-type: none">Understand these ESPC project steps and the OR's tasks and responsibilities	
8	Performance Period <ul style="list-style-type: none">Explain annual M&V activities, reviews, resolution of issues, and the importance of documentation	} Coming Soon

eProject eXpress

- **Designed** specifically for state/local governments and public institutions (streamlined pathway built into the eProject Builder platform)
- **Free resource** maintained by Berkeley Lab with funding from U.S. DOE
- **Secure, user-friendly** web-based project tracking and reporting system
- **Enables program administrators and project owners to:**
 - Communicate the ongoing impacts of their projects and programs
 - Track and quickly report project costs, estimated and guaranteed energy & cost savings, job and GHG impacts, measures implemented
 - Standardize the way ESCOs provide project and M&V summary data
 - Archive and preserve document files; help mitigate effects of staff turnover and potential future disputes
 - Save time and effort, stop reinventing the wheel, and have all key project information readily accessible when needed



Benefits for ESCOs

- **Data entry is quick** for ESCOs with the single page Excel ePX project data entry form
- **Saves time** for ESCOs – and owners – when retrieving vital documents and project information needed during the performance years
- **Reduces burden** on ESCO by giving owners quick access to the project documents and information when they need it – without having to ask the ESCO to share info
- **Clearly specifies** what information ESCOs need to summarize for their customers in the ePX template

“What took us hours—sometimes days – to create for our customers as a ‘need it yesterday report’ can be produced from data [in ePX] that may take only an hour for us to enter. That’s a huge win for everyone!” - Johnson Controls Inc. staff person



New!



The **Energy Savings Performance Contracting (ESPC) Campaign** engages states, local governments, K-12 school districts, universities, and other market stakeholders to:

- Support and encourage the use of performance contracting
- Expand and enhance ESPC through the adoption of best practices
- Achieve significant energy, environmental and cost savings benefits

Participation Benefits:



Build ESPC knowledge and technical capacity and implement best practice approaches



Maximize the impact of funding and financing, and access guaranteed savings



Implement upgrades to **increase efficiency**, address deferred maintenance, improve resiliency, reduce emissions, and support local jobs



Achieve organizational goals and **demonstrate results** with measured and verified savings



Receive recognition for applying best practices and **achieving savings goals**

Goal:
Support participants in collectively achieving **\$1 billion** in measured & verified savings



Partnership Pathways

Participant

- Access ESPC Campaign resources and technical expertise
- Engage in peer-to-peer learning
- Achieve organizational goals and showcase results with measured and verified savings
- Network with industry professionals
- Demonstrate leadership and receive recognition for exemplary projects and programs, applying best practices, and achieving savings goals

Supporter

- Demonstrate support for ESPC and M&V best practices
- Promote the ESPC Campaign to your members or customers
- Share expertise and information about your services
- Access ESPC Campaign resources
- Receive recognition through the ESPC Campaign website

Join
Today!



Get Started

ESPC Campaign

Access technical assistance and achieve measured and verified savings through this voluntary initiative

State and Local Solution Center

Resource hub for states, local governments, and K-12 school districts

Performance Contracting National Resource Center

Tools, resources, and best practices for federal and MUSH ESPC

Better Buildings Solution Center

Wide range of resources and trainings available by topic and sector, including the [ESPC Toolkit](#)

ePX Support and Training

Access support materials, guides and on-demand webinars and training videos



Subscribe:

www.energy.gov/scep/slsc

Contact:

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Thank You!

Please contact Laura.Carpenter@hq.doe.gov contact with any questions!