

ADDITIONAL RESOURCES

EPC TOOLKIT FOR HIGHER EDUCATION | APRIL 2009



CLINTON
CLIMATE
INITIATIVE



AMERICAN COLLEGE & UNIVERSITY
PRESIDENTS CLIMATE COMMITMENT

GENERAL**AMERICAN COLLEGES AND UNIVERSITIES
PRESIDENTS' CLIMATE COMMITMENT (ACUPCC)**

<http://www.presidentsclimatecommitment.org/>

ASSOCIATION OF HIGHER EDUCATION FACILITIES OFFICERS (APPA)

<http://www.appa.org/>

Serves and assists facilities officers and physical plant administrators in colleges, universities, and other educational institutions throughout the U.S.

**ASSOCIATION FOR THE ADVANCEMENT OF SUSTAINABILITY
IN HIGHER EDUCATION (AASHE)**

<http://www.aashe.org/>

An association of colleges and universities in the U.S. and Canada working to promote sustainability in all sectors of higher education - from governance and operations to curriculum and outreach - through education, communication, research and professional development.

EFFICIENCY VALUATION ORGANIZATION (EVO)

<http://www.evo-world.org/>

A global non-profit dedicated solely to measurement and verification tools. EVO wrote the International Performance Monitoring and Verification Protocol (IPMVP) referred to in this toolkit and provide consulting expertise in the M&V field.

ENERGY SERVICES COALITION (ESC)

<http://www.energyservicescoalition.org/>

A national nonprofit organization comprising a network of representatives from a wide range of organizations working together at the state and local level to increase energy efficiency and building upgrades through energy savings performance contracting.

NATIONAL ASSOCIATION OF ENERGY SERVICE COMPANIES (NAESCO)

<http://www.naesco.org/>

NAESCO represents the energy industry in state legislatures and before state regulatory bodies, on Capitol Hill, at federal agencies, and in the international marketplace.

**U.S. DEPARTMENT OF ENERGY (DOE) OFFICE OF
ENERGY EFFICIENCY AND RENEWABLE ENERGY (EERE)**

<http://www.eere.energy.gov/>

DOE's EERE works to strengthen the United States' energy security, environmental quality, and economic vitality in public-private partnerships.

**U.S. ENVIRONMENTAL PROTECTION AGENCY AND
THE U.S. DEPARTMENT OF ENERGY'S ENERGY STAR**

<http://www.energystar.gov/>

A joint program of the U.S. Environmental Protection Agency and the U.S. Department of Energy, Energy Star is helping us all save money and protect the environment through energy efficient products and practices. Energy Star is an essential resource for any building owner interested in energy efficiency. Their Portfolio Manager and Cash Flow Opportunity Calculator are useful tools as described in the 'Critical Issues in Developing and Undertaking an EPC' document.

U.S. GREEN BUILDING COUNCIL (USGBC)

<http://www.usgbc.org/campus>

A non-profit organization composed of leaders from across the building industry working to advance buildings that are environmentally responsible, profitable and healthy places to live and work. USGBC's vision is that buildings and communities will regenerate and sustain the health and vitality of all life within a generation.

OTHER EPC GUIDES AND RESOURCES**COLORADO STATE ENERGY EFFICIENCY GUIDE**

<http://www.colorado.gov/energy/commercial/performance-contracting-resources.asp>

Resource for guidelines and sample documents.

COMMONWEALTH OF PENNSYLVANIA GUARANTEED ENERGY SAVINGS MANUAL

http://www.portal.state.pa.us/portal/serverpt/gateway/PTARGS_0_2_8527_1300_244922_43/

[http%3B/pubcontent.state.pa.us/publishedcontent/publish/cop_general_government_operations/dgs/community_content/pa_gesa_manual_october_2008_final.pdf](http://pubcontent.state.pa.us/publishedcontent/publish/cop_general_government_operations/dgs/community_content/pa_gesa_manual_october_2008_final.pdf)

Written for Pennsylvania's government organizations, this toolkit contains some excellent detail on EPCs.

ENERGY SERVICES COALITION ESPC STATEWIDE PROGRAM BEST PRACTICES

<http://www.energyservicescoalition.org/espc/tools/index.html>

These best practices and tools were developed as part of the U.S. Department of Energy sponsored partnership between the ESC, NAESCO, the National Association of State Energy Officials and National Conference of State Legislators.

**EPC ENABLING LEGISLATION BY U.S. STATE FROM
OAK RIDGE NATIONAL LABORATORY**

<http://www.ornl.gov/info/esco/legislation/newesco.shtml>

This site provides links to EPC enabling legislation on a state-by-state basis.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT EPC TOOLKIT

<http://www.hud.gov/offices/pih/programs/ph/phecc/epformance.cfm>

Training materials for streamlining EPCs.

**WYOMING ENERGY CONSERVATION IMPROVEMENT
PROGRAM MANUAL AND APPENDICES**

http://www.wyomingbusiness.org/business/energy_wyecip.aspx

Resource for guidelines and sample documents.

SAMPLE DOCUMENTS**BOMA INTERNATIONAL EPC TOOLKIT - SAMPLE DOCUMENTS**

<http://www.boma.org/Resources/BEPC/Pages/default.aspx>

This toolkit contains sample documents including a sample IGA Contract and a model EPC contract.

**HANDBOOKS FOR ENERGY EFFICIENCY PROJECTS
BY THE CALIFORNIA ENERGY COMMISSION**

http://www.energy.ca.gov/reports/efficiency_handbooks/index.html

Written specifically for California, these handbooks contain comprehensive sample RFQs, including the evaluation and selection process, sample contract terms, suggested information for performance specifications, cost-effectiveness criteria, sample master lease agreement, and sample RFP for financial services.

STATE EPC RESOURCES

DATABASE OF STATE INCENTIVES FOR RENEWABLE ENERGY (DSIRE)

<http://www.dsireusa.org/>

DSIRE is a comprehensive source of information on state, local, utility, and federal incentives that promote renewable energy and energy efficiency.

| | Model Documents, Guides and Energy Performance Contracting Manuals | State Administrator of Energy Performance Contracting and/or Energy Efficiency Initiatives |
|------------|--|--|
| Alabama | <ul style="list-style-type: none"> • AEPC Manual, including, among other items, ample RFP, Sample Energy Audit Agreement, Sample Energy Service Agreement, and Alternative Dispute Resolution documents • EPC Fact sheet | <ul style="list-style-type: none"> • The Alabama Department of Economic and Community Affairs-Science, Technology and Energy Division (ADECA-STE Division) • ADECA EPC Website |
| Alaska | | <ul style="list-style-type: none"> • Alaska Energy Authority's (AEA) • AEA Home Website |
| Arizona | | <ul style="list-style-type: none"> • Arizona Department of Commerce's Energy Office • AZ Commerce ESPC Website |
| Arkansas | <ul style="list-style-type: none"> • Energy Performance Contract Flowcharts • Technical Facility Profile • Request for Project Delegation • List of Qualified ESCO's • Facility Process Steps • Plus documents for ESCO use and submittal | <ul style="list-style-type: none"> • Office of State Procurement (OSP) of Arkansas' Department of Finance and Administration (DFA) • DFA Energy Savings Projects |
| California | <ul style="list-style-type: none"> • Technical Assistance Application • Governing Board Resolution • Application Form & Sample Resolution for Low-Interest Public Agency Loans (ECAA Loans) • Technical Assistance Document for Colleges • Guide to Preparing Feasibility Studies for Energy Efficiency Projects (February 2000) • Handbook for Energy Efficiency Projects | <ul style="list-style-type: none"> • California Energy Commission • CEC Energy Partnership Program |
| Colorado | <ul style="list-style-type: none"> • Base Agreement ESCO Contract for As-Needed Energy Performance Contracting Services • Facility Owner's Memorandum of Understanding • ESCO Response to Request for Proposals for As-Needed Services • Secondary ESCO Selection Process • Commissioning Guidelines for Energy Saving Performance Contracts • Energy Performance Contract • Financing Bid Package • Measurement & Verification Guidelines for Energy Saving Performance Contracts • Technical Energy Audit (TEA) & Project Proposal Contract • Five Steps to Successful EPC | <ul style="list-style-type: none"> • Governor's Energy Office (GEO) • Greening Government is the relevant EPC program for colleges and universities • Greening Government - EPC |

| | Model Documents, Guides and Energy Performance Contracting Manuals | State Administrator of Energy Performance Contracting and/or Energy Efficiency Initiatives |
|-------------|---|---|
| Connecticut | <ul style="list-style-type: none"> Resource Guides for state facilities | <ul style="list-style-type: none"> The Energy Management Unit (in the Office of Policy and Management) provides general oversight. OPM State Building Energy Management site |
| Delaware | <ul style="list-style-type: none"> Resource Guides for state facilities | <ul style="list-style-type: none"> Office of Management & Budget and the Department of Natural Resources & Environmental Control (DNREC) Energy Office Delaware Energy Office Website |
| Florida | <ul style="list-style-type: none"> Energy Performance Contracting Process ESCO Flowchart ITN Renewal & ESCO Names Model Investment Grade Audit Agreement Agency Checklist (DFS) Model Contract (DFS) Model Financing Agreement (DFS) Procedures documents (DFS) | <ul style="list-style-type: none"> Department of Management Services (DMS) oversees the state EPC program. The Department of Financial Services (DFS) has oversight of the funding agreement. DMS Energy Initiatives and EPC DFS Energy, Water, and Wastewater EPC |
| Georgia | | <ul style="list-style-type: none"> Georgia Building Authority (GBA) Governor's Energy Policy Council, Division of Energy Resources of the Georgia Environmental Facilities Authority (GEFA) Division of Energy Resources Website |
| Hawaii | <ul style="list-style-type: none"> EPC Guide (1998) Guide Supplement (M&V) (2000) University of Hawaii at Hilo and Hawaii Community College in Hilo (EPC Case Study) | <ul style="list-style-type: none"> Department of Business, Economic Development and Tourism (DBEDT) DBEDT EPC Website |
| Idaho | <ul style="list-style-type: none"> Request for Proposal for EPC Service (RFQ) Technical Energy Audit & Project Development Agreement Sample EPC Contract Case Studies | <ul style="list-style-type: none"> Department of Administration's Division of Public Works (DPW) DoA's EPC Website The Office of Resources also offers information on Energy Efficiency in buildings and Financial Assistance |
| Illinois | <ul style="list-style-type: none"> Report on Energy Costs and Energy Efficiency at Illinois' Public Universities | <ul style="list-style-type: none"> Department of Commerce and Economic Opportunity (DCEO) DCEO EPC Program site |
| Indiana | <ul style="list-style-type: none"> GESC Presentation An Introduction to Guaranteed Energy Savings Contracts List of Guaranteed ESPC Providers (unendorsed) | <ul style="list-style-type: none"> The Office of Energy Indiana Office of Energy Development – Guaranteed Energy Savings Contracts (GESC) site |
| Iowa | | <ul style="list-style-type: none"> Iowa Utilities Board (IUB) Iowa Overview |
| Kansas | <ul style="list-style-type: none"> 5 Easy Steps to Successful EPC FCIP Pre-approved ESCOs Case studies | <ul style="list-style-type: none"> Kansas Corporate Commission – Energy Programs Division administers the Kansas Facility Conservation Improvement Program (FCIP) FCIP EPC Website |

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|---------------|---|---|
| Kentucky | <ul style="list-style-type: none"> • Kentucky EPC Fact Sheet • Sample RFP • Procedures Manual, including, among other items, Design Fee Negotiation, Bid Solicitation, Performance Evaluations and Technical Requirements & Guidelines documents • ESPC Policy Manual | <ul style="list-style-type: none"> • Governor's Office of Energy Policy (GOEP) • Kentucky ESPC website • Division of Engineering and Contract Administration assists agencies with major renovations and provides information on ESPC procedures |
| Louisiana | <ul style="list-style-type: none"> • ESPC Process Flowchart • Model RFP and Contract | <ul style="list-style-type: none"> • Division of Administration includes the Office of Facility Planning and Control and Office of Contractual Review • LA OCR EPC website |
| Maine | | <ul style="list-style-type: none"> • Maine Public Utilities Commission • Efficiency Maine website |
| Maryland | <ul style="list-style-type: none"> • Energy Plan Template • Energy Use & Energy Use Intensity Indices • Energy Management Program Efforts (One-pager) • List of Potential Energy Conservation Measures • Agency Energy Conservation Checklist • Facility Operator Energy Conservation Checklist • Jane E. Lawton Conservation Loan Program Application • Introduction to EPC - ICF Int'l - 2007 • Case studies | <ul style="list-style-type: none"> • Maryland Energy Administration (MEA) and Maryland Department of General Services (DGS) • MD EPC Website |
| Massachusetts | <ul style="list-style-type: none"> • Energy Management Services Manual • Model Energy Management Services Request for Response • Model Energy Management Services Contract • Certificate of Compliance Checklist • Comm-PASS RFR Submittal Form • Certificate of Eligibility • Annual EMS Energy and Water Savings Report • ESPC Seminar Presentation • Fundamental Concepts of EPC • Key Steps in Developing a Performance Contract • Project Financing • Developing and Negotiating Contracts • Savings Measurement and Verification | <ul style="list-style-type: none"> • The Department of Housing and Community Development (DHCD) for Housing Authorities, the Division of Capital Asset Management (DCAM) for state government buildings, and the Division of Energy Resources (DOER) for other public buildings (cities, towns, counties, and schools) • Energy Management Services EPC website |
| Michigan | <ul style="list-style-type: none"> • MI EPC Process Basics • Case studies | <ul style="list-style-type: none"> • The Energy Office of the Department of Energy, Labor and Economic Growth (DELEG) • DELEG EPC site • DELEG Public Building Energy Efficiency website |
| Minnesota | | <ul style="list-style-type: none"> • Energy Management Services, part of the Plant Management Division • PMD Energy Savings Programs • Financing & Incentive Programs provides resources for energy efficiency projects including EPC |

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| Mississippi | <ul style="list-style-type: none"> • 2007 EPC Manual • 2007 EPC Workshop • MS EPC Policy & Procedures • Step-by-Step Process for EPC Projects • Sample RFQ • Instructions for Preparing Technical Facility Profile(s) • Sample Evaluation Forms • Sample Letter of Invitation to Oral Interviews • Sample Investment Grade Energy Audit Contract • Sample Energy Services Agreement • Energy Management Plan • Energy Audit Report Guidelines • Case Studies | <ul style="list-style-type: none"> • Mississippi Development Authority • State Energy Management Program (SEMP) |
| Missouri | | <ul style="list-style-type: none"> • Department of Natural Resources, Energy Center • Energy Revolving Fund for EE Improvements |
| Montana | <ul style="list-style-type: none"> • Investment Grade Energy Audit • Energy Performance Contract • Terms and Conditions for Energy Performance Contracts • Pre-qualified Energy Service Companies (ESCO) | <ul style="list-style-type: none"> • Department of Environmental Quality (DEQ) • DEQ EPC Website • Building Commissioning Resources • Montana Department of Commerce INTERCAP Program |
| Nebraska | | <ul style="list-style-type: none"> • Nebraska Energy Office (NEO) • NEO website |
| Nevada | | <ul style="list-style-type: none"> • Nevada State Office of Energy (NSEO) • NSEO Conservation & Efficiency Resources website |
| New Hampshire | | <ul style="list-style-type: none"> • Office of Energy and Planning • Building Energy Conservation Initiative |
| New Jersey | | <ul style="list-style-type: none"> • Office of Clean Energy administers New Jersey's Clean Energy Program • NJ Clean Energy Program |
| New Mexico | | <ul style="list-style-type: none"> • Energy Conservation and Management Division • ECMD Energy Efficiency - Buildings website |
| New York | <ul style="list-style-type: none"> • Sample Contract Between NYSERDA and ESCO • Model Request for Proposals Used to Select Energy Services Companies | <ul style="list-style-type: none"> • New York State Energy Research and Development Authority (NYSERDA) • NYSERDA website • Technical Assistance Program Application (before 11/09) |
| North Carolina | <ul style="list-style-type: none"> • PCToolkit for Local Governments, K-12 Schools and Community Colleges • Open EPC Requests for Proposals • Performance Contracting Flow Chart • List of Qualified ESCOs • SEO Performance Contracting Application • SEO Sample Performance Contracting Application • LGC Application for Approval of EPC • Request for Qualifications for ESCOs • Template Energy Services Agreement • Template Investment Grade Audit Agreement • Template Request for Proposals • Case studies | <ul style="list-style-type: none"> • North Carolina State Energy Office (SEO) • Utility Savings Initiative -- EPC Program |

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| North Dakota | | <ul style="list-style-type: none"> • Division of Community Services (DCS), in North Dakota's Department of Commerce • DCS's State Buildings Energy Conservation Program |
| Ohio | <ul style="list-style-type: none"> • Case studies | <ul style="list-style-type: none"> • Department of Administrative Services' (DAS) Office of Energy Services • DAS EPC website |
| Oklahoma | <ul style="list-style-type: none"> • Higher Education Energy Loan Program • Energy Loan Fund for Schools Program Guidance & Application • Community Energy Education Management Loan Program Guidance & Application | <ul style="list-style-type: none"> • The Oklahoma State Energy Office • State Energy Office website |
| Oregon | <ul style="list-style-type: none"> • ODOE Guide to EPC (includes resources such as a sample contract, facility evaluation and RFP) • Case studies | <ul style="list-style-type: none"> • Oregon Department of Energy (ODOE) – Conservation Division • ODOE ESPC website |
| Pennsylvania | <ul style="list-style-type: none"> • Standard Request for Proposals • Energy Audit Agreement • Guaranteed Energy Service Agreement • Installment Purchase Agreement and Payment Schedule • Sample Model Request for Proposals (RFP) • Sample Technical Facility Profile (for agencies) • Sample Model Energy Audit Agreement • Sample Model Guaranteed Energy Service Agreement • PA EPC Project Implementation Flowchart • Case studies | <ul style="list-style-type: none"> • Governor's Green Government Council (GGGC) • GGGC EPC website (School Districts, Local Government Agencies, and Other Political Subdivisions) • GGGC Building Renovation and Retrofit site (Agencies) |
| Rhode Island | | <ul style="list-style-type: none"> • Rhode Island Office of Energy Resources (RIOER) • RIOER Website |
| South Carolina | <ul style="list-style-type: none"> • Office of State Engineer Manual for Planning and Execution of State Permanent Improvements • Revised EPC Manual 2006 • Quick Guide to Energy Performance Contracting • Best Practices Guide: Energy Conservation plan for Universities, Agencies and School Districts in SC | <ul style="list-style-type: none"> • Required route for assistance for public colleges and universities is through the Office of the State Engineer (OSE) OSE website • Additional information can be available from the South Carolina Energy Office SCEO EPC site |
| South Dakota | | <ul style="list-style-type: none"> • The Governor's Office of Economic Development • within the Bureau of Administration Services: the Energy Management Office oversees the South Dakota State Energy Plan and the Office of State Engineer manages the Statewide Maintenance and Repair Program • Statewide Energy Management site • Office of State Engineer site |

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| Tennessee | | <ul style="list-style-type: none"> The State Board of Regents is responsible for higher education facilities, excluding the University of Tennessee, which is separate. TBR's Office of Administration and Facilities Development website |
| Texas | <ul style="list-style-type: none"> Performance Contracting Guidelines, including Sample RFQ, Utility Assessment Report, Third Party Independent Review Requirements, State Agency Approval Checklist and Project Funding resources LoanSTAR Technical Guidelines | <ul style="list-style-type: none"> State Energy Conservation Office SECO website |
| Utah | <ul style="list-style-type: none"> Reference documents for Energy efficiency projects Case studies | <ul style="list-style-type: none"> Division of Facilities Construction and Management oversees the State Building EE Program (SBEEP) SBEEP website |
| Vermont | <ul style="list-style-type: none"> Case studies | <ul style="list-style-type: none"> Efficiency Vermont, an independent, non-profit under contract to the Vermont Public Service Board. Efficiency Vermont -- Colleges and Universities |
| Virginia | <ul style="list-style-type: none"> Back of the Envelope Audit ESCO Contract 2008 ESCO Energy Performance Contract COVA ESCO Standard Labor and Material Bond ESCO Standard Performance Bond Technical Audit MOU Case studies | <ul style="list-style-type: none"> Department of General Services' Division of Engineering and Buildings (DEB) DEB EPC website Division of Energy EPC website |
| Washington | <ul style="list-style-type: none"> ESCO contact list Sample Request for Qualification (RFQ) Short questionnaire Energy Use Form (auto) Case studies | <ul style="list-style-type: none"> The Department of General Administration (GA) ESPC GA Energy Team Program Washington ESPC website |
| West Virginia | | <ul style="list-style-type: none"> West Virginia Division of Energy WV Division of Energy website |
| Wisconsin | <ul style="list-style-type: none"> EPC Guidelines Preliminary Scoping Audit Evaluation Certified Performance contract vendors Contract for Performance contracting Energy Assessment Report Tables spreadsheet Preliminary Scoping Audit Evaluation Preliminary Scoping Audit Request Vendor Submittals-2008 | <ul style="list-style-type: none"> Department of Administration (DOA) – Division of State Facilities WI EPC website |
| Wyoming | <ul style="list-style-type: none"> WYECIP Program Manual , including among other items, Facility Owner Contract Examples, ESCO Contract Example, Investment Grade Audit and Project Development Contract, Sample EPC, Cost and Pricing Elements, Financing RFP Package, Risk Assessment Matrix, Measurement and Verification Plan Guidelines, Contract Schedules and Notice of Acceptance of Investment Grade Audit Report resources | <ul style="list-style-type: none"> Wyoming Business Council, State Energy Office runs the Wyoming Energy Conservation Improvement Program (WYECIP) WYECIP Website |

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Thumann, Albert and Eric Woodroof "Energy Project Financing: Resources and Strategies for Success." Atlanta, GA: Association of Energy Engineers, 2009. https://www.aeecenter.org/store/detail.cfm?id=885&category_id=6
(Chapter 3, "Choosing the Right Financing for Your Energy Efficiency and Green Projects with ENERGY STAR®" was written predominantly by Neil Zabler, who contributed to the 'Financing EPC' section of this toolkit.)