

**FEMP15a**  
**ESPCs: An Advanced Guide**  
**Course Summary**

Federal performance contracting mandates require agencies to evaluate their facilities, identify potential savings, and appropriately leverage both private and public sector funding to invest in comprehensive projects. This course, *ESPCs: An Advanced Guide*, introduces learners to best practices for establishing partnerships with energy services companies through Energy Savings Performance Contracts (ESPCs) to meet this challenge.

Learners will be introduced to energy savings performance contracting, including primary concepts, timelines, authorizing legislation, and stakeholder roles and responsibilities, as well key documents and processes related to the five phases of the ESPC development process:

- Phase 1: Acquisition Planning
- Phase 2: ESCO Selection and Preliminary Assessment
- Phase 3: Pre-Award Project Development
- Phase 4: Project Implementation
- Phase 5: Post-Acceptance Performance Period

The course is divided into fourteen modules:

1. Course Introduction
2. ESPC Fundamentals
3. Phase 1: Acquisition Planning
4. Achieving Deep Savings from ESPCs
5. Phase 2: ESCO Selection and Preliminary Assessment
6. Measurement and Verification (M&V)
7. Risk, Responsibility and Performance Matrix (RRPM)
8. Phase 3: Pre-Award Project Development
9. Reviewing the Technical Proposal
10. Reviewing Task Order Financial Schedules
11. Reviewing Project Financing
12. Reviewing Project Pricing
13. Phase 4: Project Implementation
14. Phase Five: The Post-Acceptance Performance Period

Learners will become familiar with best practices for developing and reviewing contracting documents associated with each phase of the ESPC process and will have an opportunity to review sample documents from within the course.

By completing this course, learners will understand:

- Basics of an ESPC, including definitions, scope, authorizing legislation, financing arrangements, team roles, and key contracting documents.
- The Five Phases of ESPC development: from team-building and acquisition planning to the project acceptance and close-out.
- The role of the Risk, Responsibility, and Performance Matrix in summarizing and assigning risks and/or responsibilities to the ESCO, agency, or both.
- The importance of measurements and verification (M&V) to a successful project, including M&V concepts, how guarantees are met, and the definition of savings
- Strategies for reviewing the ESCO's final proposal, including the technical proposal, Task Order financial schedules, project financing, and pricing.

### **Instructor**

The instructor for this course is Kurmit Rockwell. Mr. Rockwell serves as ESPC program manager at the U.S. Dept. of Energy, Federal Energy Management Program (FEMP), where he oversees services, tools, and resources needed to assist agencies with implementing successful ESPC projects. Over a career spanning 25 years, Mr. Rockwell's work has included engineering and all aspects of ESPC project implementation for federal, state, and local governments.

Mr. Rockwell's work in the public and private sector energy services industry has focused on evaluation and implementation of energy and water cost saving technologies, smart building energy optimization services, renewable energy systems, and demand side management. He holds a Bachelor's degree in Chemical Engineering from Polytechnic Institute of New York University and a Master's degree in Building Systems Engineering from the University of Colorado. He is a registered professional engineer in multiple states.