

- a. Standard Form 33, "Solicitation, Offer and Award," with Blocks 12 through 18 completed and executed by the Offeror;
- b. Additional Representations, Certifications and Other Statements of Offeror, which are provided at Attachment \_\_\_\_ to this DO RFP, completed and executed by the Offeror;
- c. A Price Proposal, in accordance with the format in Section H.14.3 below.

#### H.25.2 WRITTEN INFORMATION FOR SUBMISSION BY OFFEROR

The offeror shall prepare a written proposal limited to 15 pages not including ECM summary table or energy savings calculation spreadsheet(s). The contractor shall submit the following information in writing, as prescribed below:

- (1) ECM Descriptions and Projected Energy Savings: The Contractor shall complete and submit Attachment \_\_\_\_, entitled "ECM Descriptions and Projected Energy Savings Table," summarizing all ECMs proposed for the delivery order. This includes:

- (1) ECM No.
- (2) Title
- (3) Brief Description
- (4) Energy System Affected (e.g., Chilled Water, Steam Distribution)
- (5) Time to Implement ECM (from date of contract award)
- (6) Annual Energy Savings (in applicable energy/demand units)
- (7) Demand Reduction
- (8) Annual Energy Cost Savings
- (9) Annual O&M or Other Cost Savings
- (10) Total Annual Cost Savings

- (2) Each ECM: The contractor shall submit narrative information for items, as applicable in the format specified below:

- (1) ECM No. \_\_\_\_\_
- (2) ECM Title and Executive Summary, consisting of:
  - (a) Detailed Description of ECM
  - (b) Location Affected
  - (c) ECM Interface with Government Equipment
  - (d) Proposed Equipment Identification (manufacturer, model number and optional equipment proposed for each ECM component
  - (e) Energy Savings Proposed, broken down as follows:
    - (i) proposed ECM annual energy savings (in all applicable energy/demand reduction units)
    - (ii) detailed energy analysis documentation the proposed annual energy savings performance of ECM after installation, startup and testing. Documentation of the analysis shall include:
      - \* offeror's assumptions on current facility or energy system operating conditions

- \* offeror's assumptions on proposed facility or energy system operating conditions
- \* energy savings calculations using formulas and procedures based on accepted engineering principles, including synergistic effects of other ECMs.
- \* citation of references used for data, assumptions or empirical formulas

- (3) Energy Baseline and ECM Performance Measurement: The contractor shall provide a M&V OVERVIEW description of the measurement option selected for each ECM.
- (4) Organization for Project Implementation:  
Provide a one 8 1/2 x 11 page organization chart showing the resources to be allocated to this project, by prime and subcontractor, and by name. Also provide one page, also 8 1/2 x 11 page resumes of each individual involved in this resource allocation.

### H.25.3 PRICE PROPOSAL

The offeror shall prepare and submit Schedules H-1 through H-3, found at Attachment \_\_\_\_ to this DO RFP, in accordance with the following instructions:

Schedule DO-Ia: Schedule DO-Ia shall be used to submit the offeror's proposed estimated annual cost savings, proposed guaranteed annual cost savings, and the annual contractor payments for the project (delivery order). The values submitted on Schedule DO-Ia are for 12-month periods, beginning after complete installation of ECMs by the contractor and acceptance by the Government.

The estimated annual cost savings and the proposed guaranteed annual cost savings established in Columns (a) and (b) of Schedule DO-Ia shall be based on the fixed rates for utilities specified in the project description.

The offeror shall complete Schedule DO-Ia to reflect:

1. the estimated annual cost savings for each year of proposed delivery order term based on projected energy savings presented in technical proposal for the delivery order,
2. proposed guaranteed annual cost savings for each year of proposed delivery order term, and
3. annual contractor payments for each year of proposed delivery order term after ECM installation and acceptance by the Government.

The contractor shall adjust Schedule DO-Ia to reflect the actual years included in the contractor's proposed delivery order term.

Schedule DO-II: Schedule DO-II presents the offeror's estimated investment for each ECM contained in the project (delivery order). Total ECM investment is used to establish bonding requirements for the ECM installation period.

The Contractor shall complete Schedule DO-II to reflect the estimated price, margin (up to the maximum proposed in Schedule IDIQ-I) and total for each discrete ECM and calculate the total estimated investment for all proposed ECMs for the delivery order. The total estimated investment is used to establish performance and payment bond amounts.

Schedule DO-III Schedule DO-III shall be submitted to present the Contractor's proposed project cash flow for the ECM project (delivery order). The schedule is divided into two sections. The Installation Phase section pertains to the debt service stream and the profit on investment. The Service Phase pertains to the price and profit associated with the services the contractor supplies to maintain and verify ECM performance during the delivery order period.

The Contractor shall propose the estimated delivery order cash flows for each year of the proposed delivery order term to support the price proposal [Annual Contractor Payments, Schedule DO-Ia, Column (c)].

The selected offeror only shall prepare and submit Schedules DO-Ib and DO-V as part of pre-award requirements:

Schedule DO-Ib -- Guaranteed Performance and Contractor Payments: Schedule DO-Ib's submitted to present the selected offeror's guaranteed annual energy savings performance and contractor payments. Based on the detailed energy survey results, the selected contractor shall submit a completed Schedule DO-Ib reflecting the contractor's guaranteed annual cost savings (column (a)). The selected contractor shall submit a copy of the detailed energy survey findings, data, and calculations used to support Schedule DO-Ib.

The contractor shall receive monthly payments based on the annual fixed payment schedule, as established in each delivery order Schedule DO-Ib. (column (b). This represents the delivery order price and should be supported by information submitted in Schedule DO-III.

Schedule DO-V -- Cancellation Ceilings: Schedule DO-V presents cancellation ceilings for specified time periods to establish the maximum termination liability in the event of delivery order cancellation or termination for convenience. Based on detailed energy survey results, the selected contractor shall submit a completed schedule DO-V reflecting the annual contractor payments from schedule DO-V.

#### **H.25.4 ORAL PRESENTATION**

After submission of offers, including the written information for submission by offerors required above, each offeror must make an oral presentation to the Government's Technical Evaluation Committee (TEC). After its oral presentation, and subsequent to a TEC caucus to develop questions, each offeror must answer questions from the Panel. The purpose of the oral presentation is to test the offeror's knowledge and understanding of the requirements for the prospective delivery order. The oral presentation and a question and answer session to follow will not constitute a part of the offer, and the information communicated thereby will not become a part of any contract resulting from the solicitation. Neither the oral presentation nor the questions and answer session will constitute discussions, as defined in FAR 15.601 and 15.610, nor will they obligate the Government to conduct discussions or to solicit or entertain any revisions to the offer or a best and final offer.

**H.25.4.1 Schedule for Presentations:** The Contracting Officer will schedule the oral presentations and will notify each offeror of the date, time and location of its oral presentation after the Government receives the offers in response to this DO RFP. It is the intention of the Contracting Officer to schedule the first oral presentation to take place approximately seven days after the receipt of the offers, and will provide additional, specific instructions for the presentations with the notifications. All offeror presentations are intended to be sequential, with evaluations and selection occurring immediately afterwards. Once notified of their scheduled presentation date and time, offerors shall complete their presentations on that schedule. Requests from offerors to reschedule their presentations will not be entertained and no rescheduling of presentations will be done unless determined necessary by the Government to resolve unanticipated problems or delays encountered in the presentation process. The Government reserves the right, however, to reschedule an offeror's oral presentation at the discretion of the Contracting Officer.

**H.25.4.2 Time Allowed for Presentations:** Each offer shall have a maximum of one hour to make their uninterrupted oral presentation to the TEC. The TEC will then caucus, for up to one hour, followed by a one hour question and answer session conducted with the offeror by the TEC.

**H.25.4.3 Form of Presentations:** The Government will make an overhead project and screen, whiteboard and markers available for the presentation. The offeror may therefore use only slides and written presentation on the whiteboard only. Black and white, 8 1/2 x 11 in. overhead slides, with one inch margins, no more than eight lines (bullets) per slide, and including the company logo on each slide in the upper left hand corner is required. Graphics, such as charts, graphs and pictures, are permitted, but no other layout devices (borders), etc. are. The focus is to be on content, not appearance. Additional materials, videos, booklets and pamphlets, etc. are not permitted and their provision at the presentation will negatively affect evaluation of the offer and oral presentation.

**H.25.4.4 Documentation to be provided:** At the conclusion of the oral presentation, the offeror shall provide the TEC with a copy of a list of all the presenters by name, company and position titles, and two copies of all the presentation materials used during the oral presentation. The Government will not accept for evaluations any procedures manuals, administrative handbooks or guides, etc. which may or may not have been referenced during the presentation. The Government intends to videotape the presentations, for use by the TEC during the evaluation of the proposals. These respective videotapes will be provided to the offerors for their records after selection, award and conclusion of the process.

**H.25.4.5 Offeror's Presentation Team:** Only members of the offeror's proposal team, to include any subcontractors proposed, may participate in the oral presentation. The only exception is that any individuals who are proposed, but not currently employed by the offeror/subcontractor(s), may participate in the presentation. Key personnel proposed, such as the Project Manager or key engineering personnel critical to accomplishment of the project, are expected to participate in the presentation.

**H.25.4.6 Discussions and Clarification of Presentation Points:** During the question and answer session, questions, answers and any discussions will be limited to what was presented in the oral presentation, and not address any aspect of the offer's price proposal. The intent will be for clarification of any information provided during the presentation which was deemed to be unclear or required more adequate support, and will not constitute discussions as defined by FAR 15.601 and 15.610.

**H.25.4.7 Content of Oral Presentation:** The contractor shall include the following information in its Oral presentation to the Government. This information should not be included in the written material required above, except to the extent that related information or references are necessary for clear understanding:

**ECM Descriptions - Additional Information**

For each ECM submitted in written proposal please discuss the following:

- (1) Address if any Utility Interruptions and their extent are required for installation of the proposed ECMs.
- (2) Address whether any Government support will be required during the implementation of the ECM's.
- (3) Briefly describe any potential environmental impact(s) expected to result from installed ECMs.
- (4) Provide and explain the ECM Project Schedule, to include the proposed duration of the key phases, specifically, the investment grade facility audit, engineering/design/acceptance, Equipment Procurement Leadtimes, and Installation and Commissioning.

**Energy Baseline and ECM Performance Measurement**

Based on the M&V option for each ECM selected in the written submission, define in detail the site-specific M&V Plan, to include the following elements:

- (1) Statement of objectives as to what is to be estimated (i.e., gross annual Kwh savings on a project basis.)
- (2) Parameters that will be used in the estimation of annual energy savings, including variable load, hours of operation, installation status of measures, etc.
- (3) Sampling plan, if required, including designation of usage groups, and calculation of populations and sample sizes by usage group. (Define your usage groups and present the calculation and assumptions used to determine sample size by each usage group area.
- (4) Data collection plan, including data to be collected in terms of parameters, and units and points of measurement (raw meter data, if available, as well as analyzed and summary data must be obtained); identification of instrumentation and metering equipment; description of protocols for the calibration of equipment; description of data gathering and quality control procedures for checking completeness and accuracy of the recorded data; and periods of monitoring, including duration and frequency.
- (5) Analysis method to estimate annual energy savings based on recorded data, to include a discussion on relevant equations and assumptions.

- (6) Describe expected pre-Installation energy and facility performance baseline to be used, including equipment/systems; baseline energy use; factors which influence baseline energy use; and system performance factors (e.g., lighting levels, temperature set points, etc.).
- (7) Describe expected post-Installation facility conditions, including equipment/systems; post-installation energy use; and/or factors that influence post-installation energy use.
- (8) Provide and support determination of energy savings based on the selected approach and the pre and post installation conditions.
- (9) Describe plan for future periodic (annual) measurements of ECM and facility performance and calculation of current period (year) savings.
- (10) Describe plan for resolving any disputes regarding issues such as baseline, baseline adjustment, energy savings calculation and the use of periodic measurements.

#### **Management Approach**

Based on the organization chart provided in the written submission, describe how you will implement the ECMs proposed for the project. Include a description of the responsibilities of each element shown on the organization chart, and the lines of authority which will exist. If portions of the project are to be subcontracted, identify the subcontracted functions and also address the subcontractor organization, personnel responsibilities and lines of authority for the specific project, based on the subcontractor organization charts provided in the written materials. Describe capabilities of contractor's personnel responsible for key elements on proposed organization chart.

## **H.26 PROPOSAL EVALUATION FOR DELIVERY ORDERS**

Proposals will be evaluated using the criteria specified herein. Proposals will be evaluated using factors in two (2) categories: Technical and Price. Technical Evaluation Factors are more important than Price Evaluation Factors. The Government is more concerned about obtaining superior technical features (e.g., comprehensive technical proposals) than making an award at the lowest cost to the Government. However, the Government shall not make an award at a price premium it considers disproportionate to the benefits associated with the proposed superiority of the technical proposal. The Government will select the contractor whose proposal is the best value to the Government to perform the delivery order. Award is conditioned upon the selected contractor meeting the pre-award requirements as specified in the Section H "Pre-award Requirements" clause. The Government's decision shall not be subject to protest by the contractors.

### **1. Technical Evaluation Factors**

Factor I - ECM Descriptions & Projected Energy Savings  
 Factor 2 - Energy Baseline & ECM Performance Measurement  
 Factor 3 - Management Approach

Unless specified otherwise in the delivery order solicitation, Factors 1 and 2 are most important and Factor 3 is least important.

- a. Factor 1 - ECM Descriptions and Projected Energy Savings
  - (1) Technical feasibility, reasonableness, acceptability of proposed ECMs.
  - (2) Proposed energy savings are realistic and energy analysis is based on sound assumptions and engineering principles.
  - (3) Impacts on Government facilities and operations are acceptable and reasonable.
  - (4) Potential environmental impacts are adequately addressed.
  - (5) Proposed project implementation schedules are realistic and reasonable.
- b. Factor 2 - Energy Baseline and ECM Performance Measurement
  - (1) Baseline & M&V plan reflects clear understanding and compliance with M&V protocols
  - (2) Acceptable and reasonable sampling and data collection plans based on proposed ECMS.
  - (3) Methods to establish determine pre and post-installation conditions and determine energy savings are adequate and reasonable.
  - (4) Periodic measurement approach for ECMs and facility performance are adequate and reasonable to provide assurance of continued effective monitoring of ECM performance.
- c. Factor 3 - Management Approach
  - (1) Offeror's proposed organization to manage and accomplish the proposed ECMs is well suited and addresses all key elements to ensure successful project implementation and maintenance of ECM performance.

2. Price Proposal Evaluation Factors

- a. Price proposals will be evaluated to assess:
  - (1) The completeness of the proposed price (i.e. sum of annual contractor payments) with regard to the contractor's understanding of the work.
  - (2) The realism as much as reasonableness of the proposed price.
  - (3) Verification that guaranteed annual energy cost savings exceed price.
  - (4) Verification that the proposed margin(s) and finance charges proposed are the same as or lower than those contained in the IDIQ contract.
- b. The price proposal will not be point scored.

### PROJECT EXAMPLE NO. 3:

The agency seeks to use a delivery order only for lighting retrofit for existing office space.

#### Assumptions:

- Agency can provide ESCOs the lighting fixture type, quantity and estimated annual number of hours lighting fixtures are on.
- May limit agency use same ESCO through use of "logical follow-on" sole source exception for other than lighting projects (i.e. agency wants to significantly expand complexity and scope of follow-on delivery order)

#### General Recommended Approach:

- Limit the amount of written technical proposal information to 3 pages plus ECM summary tables and energy savings spreadsheet(s) (if required).

#### Template for Project Example No. 3:

## **H.25 REQUIREMENTS FOR PROPOSAL CONTENTS FOR DELIVERY ORDERS**

The Government shall award a fixed price delivery order as a result of this DO RFP solicitation. Proposals shall be submitted initially on the most favorable terms from a price and technical standpoint, and in accordance with the following requirements.

Each offeror must (1) submit an offer; (2) submit written information that pertains to description of the ECM's and projected energy savings, energy baseline and energy performance measurement approach to demonstrate its understanding of the Government's requirements. When evaluating an offeror's capability to perform the prospective delivery order, the Government will consider how well the offeror complied with these instructions.

### **H.25.1 OFFER**

The completion and submission to the Government of the following items will constitute an offer and will indicate the offeror's unconditional assent to the terms and conditions in this DO RFP, and its Attachments, as well as the IDIQ contract. Any objection to any of the terms and conditions of this DO RFP or the IDIQ contract will constitute a deficiency (see FAR 15.601), which will make the offer unacceptable. An offeror may correct a deficiency only through discussions (see FAR 15.610). As the Government intends to award a delivery order without discussions, offerors are cautioned to consult with the Contracting Officer before submitting an offer that takes exception to any term or condition of the DO RFP. However, the Government reserves the right to conduct discussions and to permit offerors to revise their offers/proposals.

The following items shall be submitted in writing, and constitute the offer:

- a. Standard Form 33, "Solicitation, Offer and Award," with Blocks 12 through 18 completed and executed by the Offeror;
- b. Additional Representations, Certifications and Other Statements of Offeror, which are provided at Attachment \_\_\_\_ to this DO RFP, completed and executed by the Offeror;
- c. A Price Proposal, in accordance with the format in Section H.26.3 below.

## H.25.2 WRITTEN INFORMATION FOR SUBMISSION BY OFFEROR

The offeror shall prepare and submit the following information in writing, as prescribed below:

- (1) ECM Descriptions and Projected Energy Savings: The Contractor shall complete and submit Attachment \_\_\_\_, entitled "ECM Descriptions and Projected Energy Savings Table," summarizing all ECMs proposed for the delivery order. This includes:

- (1) ECM No.
- (2) Title
- (3) Brief Description
- (4) Energy System Affected (e.g., Chilled Water, Steam Distribution)
- (5) Time to Implement ECM (from date of contract award)
- (6) Annual Energy Savings (in applicable energy/demand units)
- (7) Demand Reduction
- (8) Annual Energy Cost Savings
- (9) Annual O&M or Other Cost Savings
- (10) Total Annual Cost Savings

- (2) ECM Narrative: The contractor shall limit the narrative to 3 pages (not including the ECM summary table above and lighting project energy savings calculation spreadsheet(s)).

The contractor shall submit narrative information for items, as applicable in the format specified below:

- (1) ECM No. \_\_\_\_\_
- (2) ECM Title and Executive Summary, consisting of:
  - (a) Detailed Description of ECM
  - (b) Energy Savings Proposed, broken down as follows:
    - (i) proposed ECM annual energy savings (in all applicable energy/demand reduction units)
    - (ii) detailed energy analysis documentation the proposed annual energy savings performance of ECM after installation, startup and testing. Documentation of the analysis shall include:
      - \* offeror's assumptions on current facility or energy system operating conditions
      - \* offeror's assumptions on proposed facility or energy system operating conditions
      - \* energy savings calculations using formulas and procedures based on accepted engineering principles, including synergistic effects of other ECMs.
      - \* citation of references used for data, assumptions or empirical formulas

The selected offeror only shall prepare and submit Schedules H-Ib and H-V as part of pre-award requirements:

Schedule DO-Ib -- Guaranteed Performance and Contractor Payments: Schedule DO-Ib 's submitted to present the selected offeror's guaranteed annual energy savings performance and contractor payments. Based on the detailed energy survey results, the selected contractor shall submit a completed Schedule DO-Ib reflecting the contractor's guaranteed annual cost savings (column (a)). The selected contractor shall submit a copy of the detailed energy survey findings, data, and calculations used to support Schedule DO-Ib.

The contractor shall receive monthly payments based on the annual fixed payment schedule, as established in each delivery order Schedule DO-Ib. (column (b)). This represents the delivery order price and should be supported by information submitted in Schedule DO-III.

Schedule DO-V -- Cancellation Ceilings: Schedule DO-V presents cancellation ceilings for specified time periods to establish the maximum termination liability in the event of delivery order cancellation or termination for convenience. Based on detailed energy survey results, the selected contractor shall submit a completed schedule DO-V reflecting the annual contractor payments from schedule DO-Ib.

## H.26 PROPOSAL EVALUATION FOR DELIVERY ORDERS

Proposals will be evaluated using the criteria specified herein. Proposals will be evaluated using factors in two (2) categories: Technical and Price. Technical Evaluation Factors are more important than Price Evaluation Factors. The Government is more concerned about obtaining superior technical features (e.g., comprehensive technical proposals) than making an award at the lowest cost to the Government. However, the Government shall not make an award at a price premium it considers disproportionate to the benefits associated with the proposed superiority of

the technical proposal. The Government will select the contractor whose proposal is the best value to the Government to perform the delivery order. Award is conditioned upon the selected contractor meeting the pre-award requirements as specified in the Section H.29, "Pre-award Requirements" clause of the IDIQ contract. The Government's decision shall not be subject to protest by the contractors.

### 1. Technical Evaluation Factors

Factor I - ECM Descriptions & Projected Energy Savings

Factor 2 - Energy Baseline & ECM Performance Measurement

Factors 1 is more important than Factor 2.

#### a. Factor I - ECM Descriptions and Projected Energy Savings

- (1) Technical feasibility, reasonableness, acceptability of proposed ECMS.
- (2) Proposed energy savings are realistic and energy analysis is based on sound assumptions and engineering principles.
- (3) Proposed project implementation schedules are realistic and reasonable.

- b. Factor 2 - Energy Baseline and ECM Performance Measurement
  - (1) Method selected to establish determine pre and post-installation conditions and determine energy savings are adequate and reasonable.

2. Price Proposal Evaluation Factors

- a. Price proposals will be evaluated to assess:
  - (1) The completeness of the proposed price (i.e. sum of annual contractor payments) with regard to the contractor's understanding of the work.
  - (2) The realism as much as reasonableness of the proposed price.
  - (3) Verification that guaranteed annual energy cost savings exceed price.
  - (4) Verification that the proposed margins(s) and finance charges proposed are the same as or lower than those contained in the IDIQ contract.
- b. The price proposal will not be point scored.

**INTENTION TO PROPOSE FORM**

Company Name and Address:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Internet Address:\*

\_\_\_\_\_

Company Contact Name and Title:

\_\_\_\_\_  
\_\_\_\_\_

Authorized Signature:

\_\_\_\_\_

Date:

\_\_\_\_\_

We intend to submit an offer for (check appropriate item):

- Central Region only  
 Midwest Region only  
 Both regions

Mail, Fax or E-mail form to:

Beth H. Peterman, Contracting Officer  
DOE/Golden Field Office  
1617 Cole Blvd., Bldg. 17/2  
Golden, CO 80401  
Attn: DE-RP36-97GO10218

fax: (303) 275-4754      E-mail: beth\_peterman@nrel.gov

**\*It is critical that potential offerors submit this Intent to Propose Form, as only those who submit this form will be notified of Amendments to the solicitation.**

PAST PERFORMANCE QUESTIONNAIRE

PART I - CONTRACTOR AND CONTRACT IDENTIFICATION

1. Contractor (Company/Division):

\_\_\_\_\_  
\_\_\_\_\_

Indicate whether your company was the prime contractor or a subcontractor:

Prime contractor: \_\_\_\_\_

A subcontractor: \_\_\_\_\_

2. Contract Number: \_\_\_\_\_

Contracting Activity: \_\_\_\_\_

Contract Type: \_\_\_\_\_

Performance Period: \_\_\_\_\_

(include any options) \_\_\_\_\_

Contract Value:

Initial Amount

Current/Revised Amount(s)\*

Estimated Savings:

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Guaranteed Savings

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Contractor Payments

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Value

\$ \_\_\_\_\_

\$ \_\_\_\_\_

\*Should reflect any contract value increases/decreases since initial contract award.

3. Brief Description of the Requirement (energy conservation project; facility energy management services; etc.): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

4. Unusual Contract Features or Conditions: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

5. Any Contract Revisions (Were there any contract descopes, partial terminations, major waivers/deviations, or other important changes to the contract terms and conditions and why did they occur? Were any due to poor contractor performance? What were the adverse impacts to program goals, if any? (Provide as an Attachment, or indicate N/A.)

PART II - PAST PERFORMANCE EVALUATION

Please rate the contractor as Outstanding (O); Good (G); Adequate (A); Poor (P); Unacceptable (U) or Not Applicable (N/A) in the following areas. Please give a short narrative as to why you chose the adjective you did, especially for those areas which are other than adequate.

A. QUALITY OF SERVICES

1. Overall performance in design, implementation and maintaining energy conservation projects:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Quality control, workmanship, and conformance to specifications:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B. TIMELINESS OF PERFORMANCE

1. Development, implementation and adherence to work schedules:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Timely completion of deliverables:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. COST CONTROL

1. Accurately estimated and managed project cost effectiveness, and adhered to cost savings targets:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. If there was any change in the contractors payments or savings to the Government that was the contractor's fault, please explain the reasons why. Was it avoidable?

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

D. BUSINESS PRACTICES

1. Contractor possessed strong skills in efficiently and effectively allocating and directing personnel and resources:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Contractor conducts project in businesslike manner and showed willingness to cooperate with Government personnel and other contractors:

Rating: \_\_\_\_\_ Comment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Content and accuracy of technical, business, cost and/or other reports:  
Rating: \_\_\_\_\_ Comment: \_\_\_\_\_

\_\_\_\_\_

4. Compliance with contract terms and conditions:  
Rating: \_\_\_\_\_ Comment: \_\_\_\_\_

\_\_\_\_\_

E. CUSTOMER SATISFACTION

1. Please comment on the strong and weak points of the contractor's performance and management of the energy conservation project: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Please comment on the overall satisfaction of your organization's technical monitors with contractor performance: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PART III - RESPONDENT INFORMATION**

A. Name of Evaluator: \_\_\_\_\_

B. Position and Title: \_\_\_\_\_

## SITE TOUR INFORMATION AND REQUEST FORM

### Site Tour Information

The U.S. Department of Energy welcomes your participation in the Central/Mid-West Regional Super ESPC, IDIQ solicitation process. As explained in Section L.32 of the RFP, the purpose of the site walk-through tours is to familiarize potential offerors with the proposal sites. Section L.32 also states that these tours are not required in order to prepare the site-specific offers since the proposal, and the evaluation of it, is to be based **ONLY** on the information contained in the site data packages. If you have not already obtained the complete site data packages, please refer to Section L.33 of your solicitation for ordering information.

Due to the nature of this competitive procurement, it will not be possible to answer any site-specific questions or solicitation questions during the site walk-through tours. Any questions must be submitted in writing in accordance with Section L.15. It is emphasized that all site-specific proposals must be based solely on the information in the site data packages. Any site-specific assumptions necessary for completion of your proposal must be clearly stated in your offer.

### General Site Tour Instructions:

Since each tour group must be limited in size, the tours are scheduled in advance, with the number of tours necessary at each site conducted on the day scheduled for each site, as indicated below. Potential offerors must complete the tour request form included below in order to reserve a tour space. Each offeror will be limited to three (3) tour participants. The tour request form should be completed and returned to the tour coordinator as soon as possible, in accordance with the instructions on the form. Tour reservations will be accepted and scheduled on a first-come, first-served basis. Confirmation of your scheduling will be provided by the same means by which the tour request form is submitted (email, fax, etc.), probably within 24-48 hours of its receipt by the tour coordinator, and certainly by no later than June 18, 1997. Tour requests received after close of business, June 17, 1997 may not be honored if tour slots are no longer available. Should your request NOT be confirmed in accordance with the above, you should call or otherwise contact Jeff Hahn at (303) 275-4775 (email - jeff\_hahn@nrel.gov) to confirm that you are scheduled.

Tour site dates, addresses and directions are provided below:

#### **TOUR SITE #1:** Dwight D. Eisenhower Museum and Library

Tour Date: Tuesday, July 22, 1997

Address: Dwight D. Eisenhower Museum & Library  
Buckeye Street  
Abilene, KS

Directions: From Wichita, Kansas (115 miles): Take Hwy I-135 North to I-70; Take Hwy I-70 East to State Hwy 15 at Abilene

From Kansas City, KS (150 miles): Take Hwy I-70 to state Hwy 15 at Abilene

At Abilene: Take State Hwy 15 (Buckeye St.) South through town to Eisenhower Center on East side of street. Meet at the Visitor's Center on corner of SE 3rd St. and Hwy 15 (Buckeye St.).

#### **TOUR SITE #2:** U.S. Department Of Labor, Gary Job Corp Center

Tour Date: Thursday, July 24, 1997

Address: San Marcos, Texas

Directions: The Gary Job Corps Center is located in San Marcos, Texas, on I-35, 30 miles south of Austin and 48 miles northeast of San Antonio.

From San Marcos, turn east at the road marked Highway 80 & 21 to Bastrop & Luling.  
Pass a Super Wal-Mart on the left side of the road.

Turn left on Highway 21 (to Bastrop) just past a small highway bridge over the Blanco River.  
Cross a set of railroad tracks.

Turn right at the second right after the railroad tracks. This is the main entrance. It is marked by a group of 10-15 flags.

Pull in at the Guard Gate, show a driver's license and a valid proof of insurance for your vehicle. If you have a rental car, just show the rental papers. The guard will give you a pass and directions to the location of the meeting site, which is the Administration Building (Number 6104), conference room.

**TOUR SITE #3: NASA Lewis Research Center**

Tour Date: Tuesday, July 29, 1997

Address: NASA Lewis Research Center  
21000 Brookpark Road  
Cleveland, Ohio

Directions: Direction to NASA from the Cleveland Hopkins Airport:  
From the airport take route 237 North. Take the "Toledo Lakewood" exit, turn left to go West on route 17, Brookpark Rd. Go about 1 mile on Brookpark Rd. and after the 3rd traffic light, there will be a "NASA" sign on the right. Enter and follow a "Main Entrance" sign to go to the main gate. Visitor badges will be available at the main gate.

Requirement: Must be a U.S. citizen to participate in this tour.

**TOUR SITE #4 USDA-ARS National Animal Disease Center**

Tour Date: Thursday, July 31, 1997

Address: Ames, Iowa

Directions: Approximately 35 miles north of Des Moines, IA.  
Take I-35 to the Ames 13th Street (#113) exit, turn west and travel about 1/4 mile to the first stoplight at Dayton Road. Turn north on Dayton for approximately 3/4 mile to the entrance of the National Animal Disease Center. The entrance will be near the watertower and visitors parking is located near the Main Building entrance and flagpole. Visitors are to sign-in at the reception desk and will be directed to a conference room.

**Tour Request Form**

Instructions: Provide company and contact information. All communication concerning the site tour will be with the company contact. The tour group consists of those individuals representing your company or proposal team who will be attending the site tour(s). Fax completed Tour Request Form (or email) by no later than 4:00 p.m. MDT, July 17, 1997, to:

U.S. Department of Energy, Golden Field Office  
Attn: Jeffrey L. Hahn  
1617 Cole Blvd., Bldg. 17/2  
Golden, CO 80401-3393  
phone: (303) 275-4775  
fax: (303) 275-4753  
Internet Address: jeffrey\_hahn@nrel.gov

Offeror's Company Name: \_\_\_\_\_

Offeror's Company Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone: \_\_\_\_\_

Contact Fax No.: \_\_\_\_\_

Contact Email Address: \_\_\_\_\_

**Tour Site #1:** (7/22/97) Dwight D. Eisenhower Museum & Library; Abilene, Kansas

Tour Group Names & Affiliation: (Maximum of three people)

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

Offeror's Company Name: \_\_\_\_\_

**Tour Site #2** (7/24/97) Gary Job Corp Center, San Marcos, Texas

Tour Group Names & Affiliation: (Maximum of three people)

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

**Tour Site #3** (7/29/97) NASA Lewis Research Center, Cleveland, Ohio

Tour Group Names & Affiliation: (Maximum of three people)

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_

**Tour Site #4** (7/31/97) USDA National Animal DiseaseCenter, Ames, Iowa

Tour Group Names & Affiliation: (Maximum of two people)

Name \_\_\_\_\_ Company \_\_\_\_\_

Name \_\_\_\_\_ Company \_\_\_\_\_