

District of Saanich ESCO Evaluation

This PDF contains 3 documents supplied by the District of Saanich outlining their criteria used to select an Energy Service Company (ESCO) to perform Saanich civic building retrofits. These documents are:

- A Meeting Agenda, used during the selection process when meeting with candidates
- Interview questions for ESCOs
- ESCO reference check questions

Team Meeting Agenda

2:00 PM, June 3, 2003 Committee Room #3

- 1) Introduction (10 minutes)
 - _ Project scope
 - _ Process thus far
 - _ Status and meeting purpose
- 4) Review of RFQ preliminary evaluation and scoring (1 hour)
- 5) Process going forward (15 minutes)
 - _ Short-list of 4 (drop lowest scored bidder)
 - _ Communication to all
 - _ Invite 4 to half day site visits... not mandatory... (week of June 9)
 - _ Request 4 short-list bidders to deliver presentation addressing specific topics which are sent out in advance (week of June 23)
 - _ Final selection
- 6) Topics to address at presentation (35 minutes)
 - _ Demonstrate specific retrofit experience vis-à-vis municipal facilities and recreation centres
 - _ Demonstrate specific experience vis-à-vis water conservation and alternative energy technologies
 - _ Discussion of the guarantee (costs and savings)... what happens if building operating regime changes from baseline?
 - _ Dealing with disputes
 - _ Partnering philosophy and client responsiveness
 - _ Explanation of concept report cost estimate

ESCO Interviews - July 16, 2003

Part 1: Presentation by ESCO to Address the Following:

- 1) Experience with municipalities and in particular pools and arenas
- 2) Experience with alternative energy technologies and focus on water conservation
- 3) Approach to making building design changes and focussing on more than just energy efficiency
- 4) discussion of the energy savings guarantee
- 5) demonstration of competitiveness
- 6) philosophy re making the long term partnership work for both parties
- 7) Local presence, ability to take on the work and responsiveness

Part 2: Questions and Answers from Saanich:

- 1) One of the facilities included in this project has a history of mechanical problems and is suspect of building envelop/condensation concerns. Describe how you would address these issues during the energy service contract.
- 2) A ten to twelve year partnership is a lengthy term, how can Saanich be sure your company will be in business for the term and can you explain what happens to the contract should your company fold or change principals?
- 3) If you are the successful vender describe what time line Saanich may expect to complete the process of planning, design, and construction implementation? Are various phases anticipated ?
(Order of events following interviews; Saanich awards contract, ESCO completes a preliminary review of buildings, letter of intent is prepared and signed by both parties, thorough design begins)

Reference Questions - ESCO Contractors

May 27,2003

How satisfied were you with the ESCO process relating to the following questions:

- 1) Did your organization manage the process with existing staff or ?
- 2) How satisfied were you with communications between the ESCO and your staff?
- 3) How well did they accept your staff 's input, suggestions and concerns?
- 4) Were you satisfied with their demonstrated knowledge and technical experience ?
- 5) Were your expectations met during the construction phase or phases?
- 6) Did they provide training and awareness sessions facility staff and occupants?
Comments?
- 7) How accurate have the projected costs and projected savings been compared to actual?
- 8) How long is the term of the contract and are you satisfied with the ongoing support?
- 9) Overall would you say the project was a positive experience and would you support a duplicate project without changing a thing?

General Comments;