



ESPC Program Kick-Off Worksheet

Purpose: Help a Municipal / University / School / Hospital (MUSH) market quickly frame an Energy Savings Performance Contract (ESPC) opportunity, identify priority measures, and round up the people and data needed to generate and keep momentum.

1. Take Stock of Today

Fill in what you already know. Gaps are OK—you can circle back.

System / Area	What's Broken or Under-performing?	Symptoms (complaints, outages...)	Criticality (1–5)
Lighting			
HVAC			
Boilers/ Chillers			
Controls /BAS			
Water & Sewer			
Other _____			

Annual Utility Spend (water, sewer, energy) (approx.) \$ _____

Number of Buildings _____

Square Feet of Buildings (approx.) _____

Quick Win(s) I see right now: _____



2. Picture the Possibilities

Brainstorm improvements needed or wanted, based on published plans or Board/Council goals.

Mark anything you're unsure about with a "?"

Energy Conservation Measures (ECMs):

- ☐ LED lighting & controls
- ☐ HVAC retro-commissioning or replacement
- ☐ Heat-pump chillers / water heaters / electrification
- ☐ Building automation system upgrades
- ☐ Demand response
- ☐ Water fixture/irrigation retrofits
- ☐ Solar PV / carports
- ☐ Battery Energy Storage System
- ☐ Building Envelope
- ☐ ...add your own ideas:

Non-Energy Goals:

- ☐ Deferred Maintenance
- ☐ Comfort
- ☐ Carbon reduction goals
- ☐ Resiliency
- ☐ Compliance
- ☐ Training O&M Staff
- ☐ ...add your own ideas:



3. Stakeholder Map

List everyone who can block or boost the ESPC. (Identify those with "**veto power**" early!)

Role / Dept	Name	Why They Care (key interests)	Influence (H/M/L)	Engagement Tactic
Facilities Director		Uptime, budget		
Finance / CFO		Long-term savings		
Procurement		Contract compliance		
Legal		Risk & T&Cs		
City Council / Board		Public benefits		
Sustainability		Carbon goals		
Key Occupants		Comfort, disruption		
...others				

4. My 30-Day Action Plan

- ☐ Complete this worksheet
- ☐ Collect 12–24 months of utility bills (Due: ___ / ___ / ___)
- ☐ Schedule a *free technical assistance* call with ESC (Due: ___ / ___ / ___)
 - Schedule intro call with state ESPC program (Due: ___ / ___ / ___)
 - Identify potential ORs/ESCOs (Due: ___ / ___ / ___)
 - Prep 1-page concept memo for leadership (Due: ___ / ___ / ___)
- ☐ Set follow-up meeting with Finance (Due: ___ / ___ / ___)
- ☐ My Success Metric: Understand IF an ESPC is right for you.
And if so... Within 90 days, secure approval to issue RFQs for Owners Reps and ESCOs