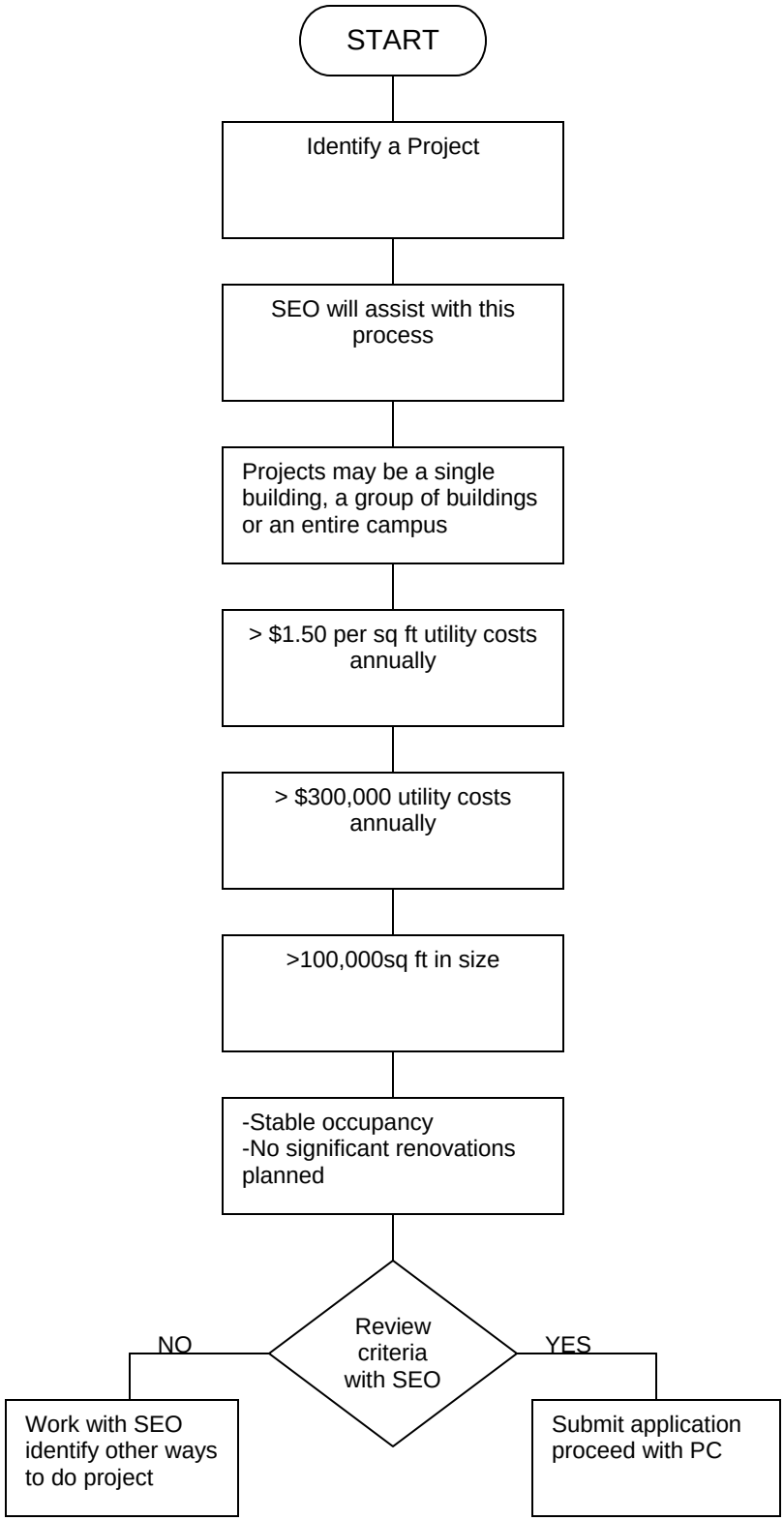
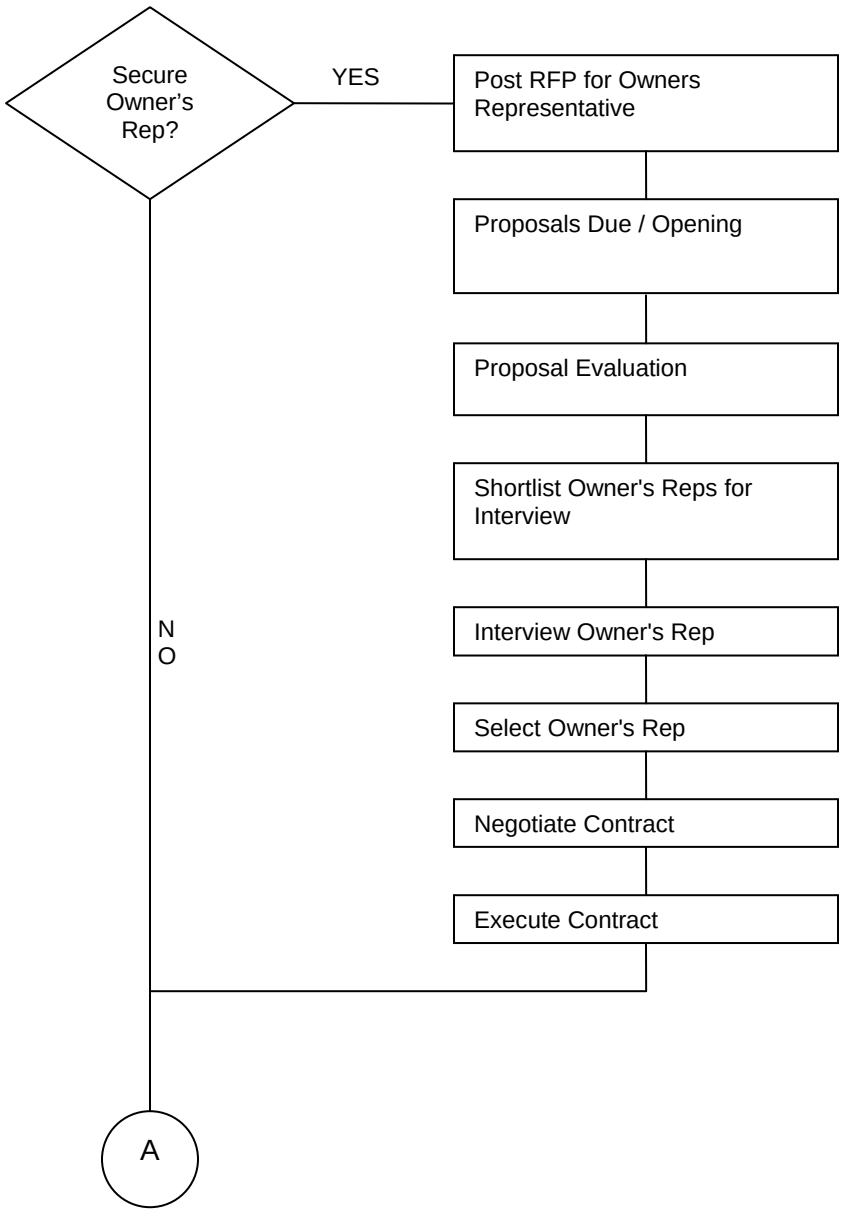
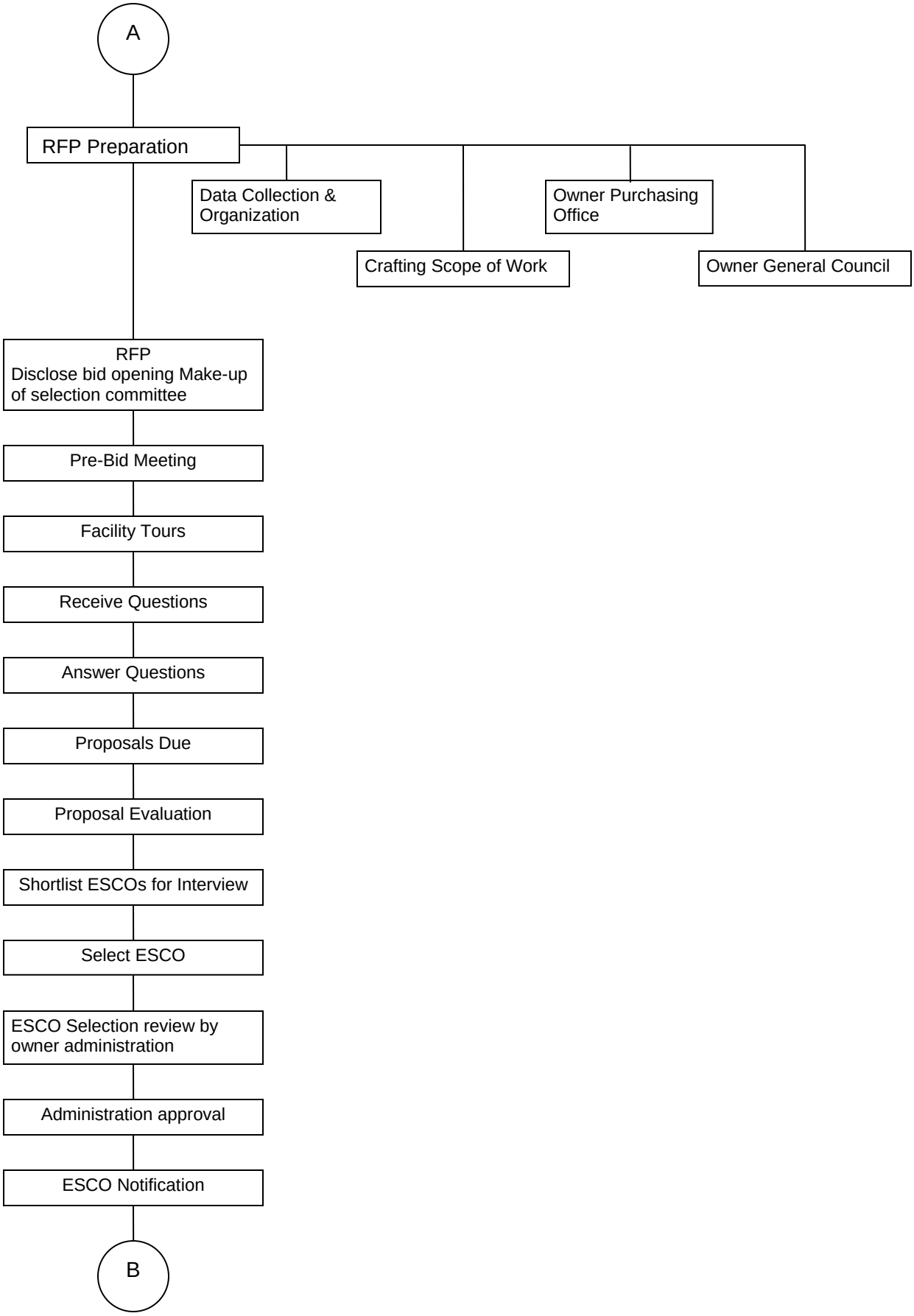
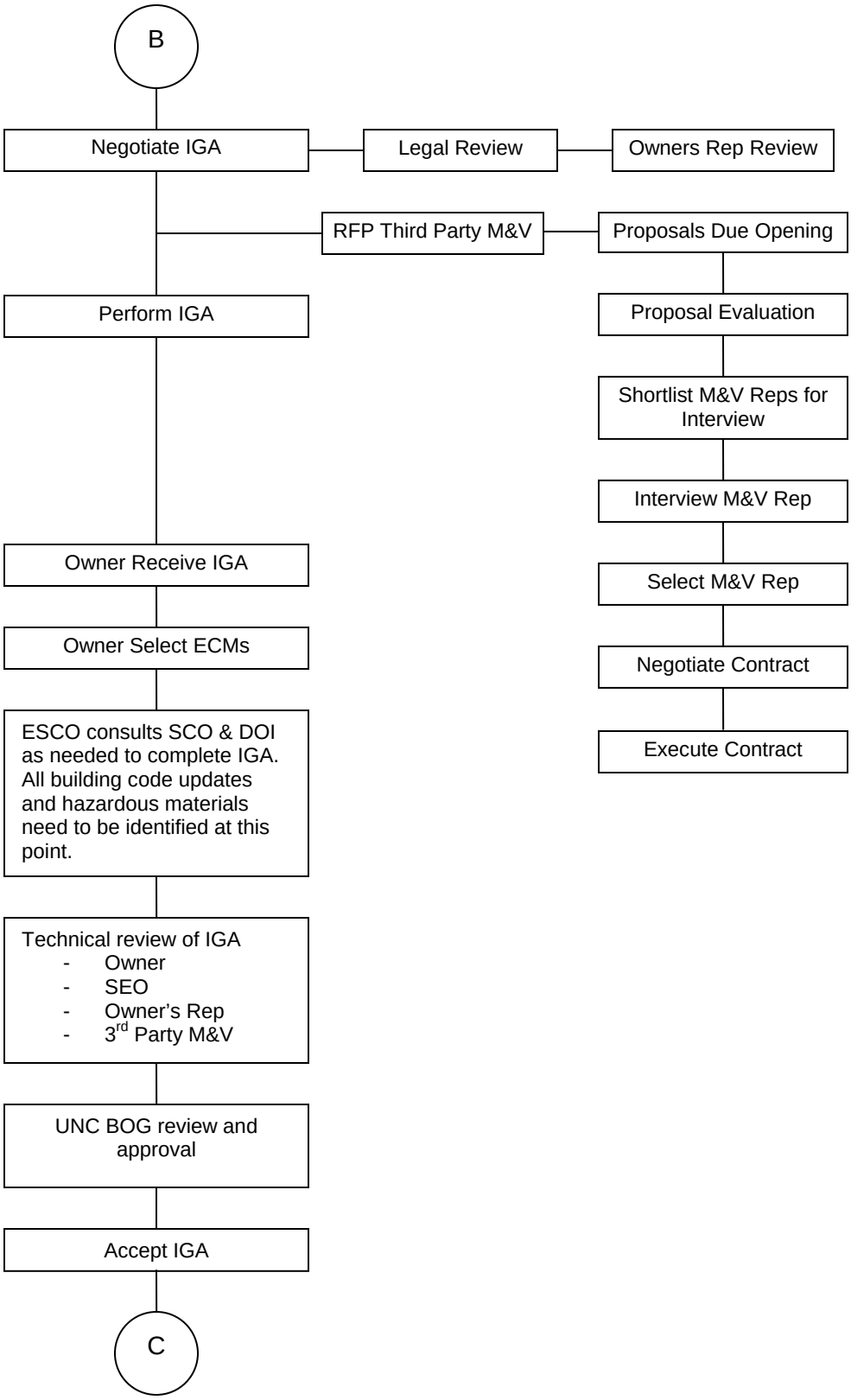
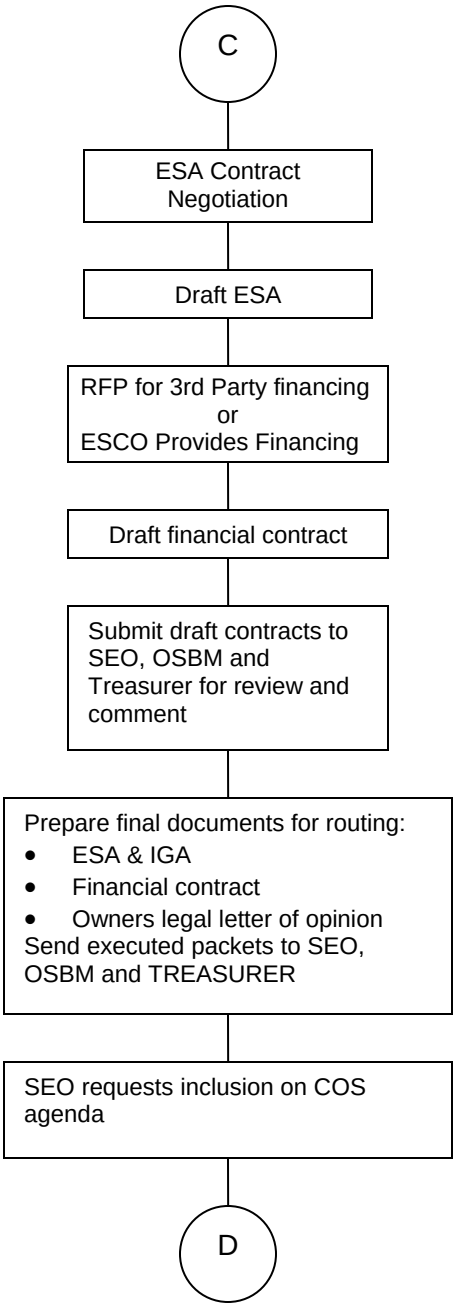
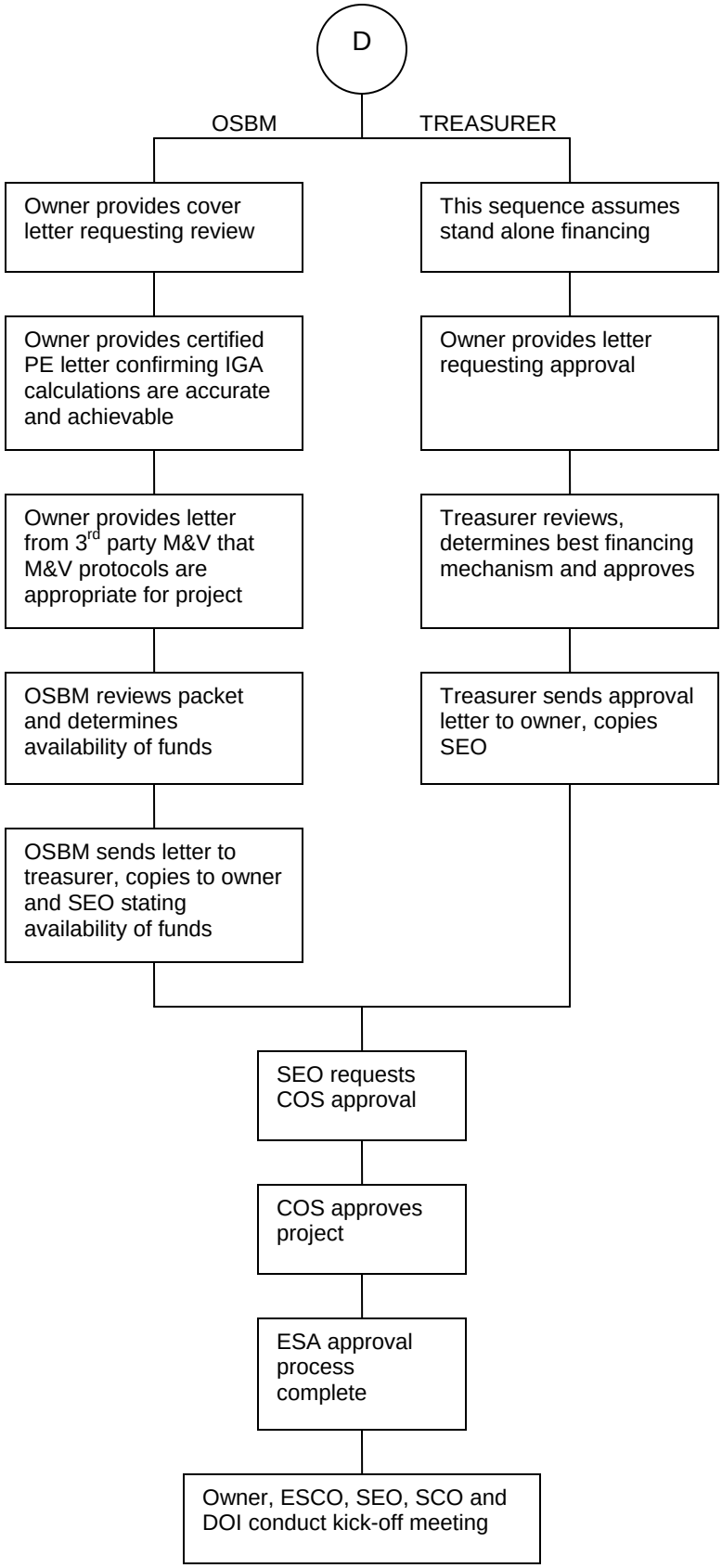

START
Identify a Project
SEO will assist with this process
Projects may be a single building, a group of buildings or an entire campus
> $1.50 per sq ft utility costs annually
> $300,000 utility costs annually
>100,000sq ft in size
-Stable occupancy
-No significant renovations planned
Review criteria with SEO
NO
YES
Work with SEO identify other ways to do project
Submit application proceed with PC


Secure Owner's Rep?
YES
Post RFP for Owners Representative
Proposals Due / Opening
Proposal Evaluation
Shortlist Owner's Reps for Interview
Interview Owner's Rep
Select Owner's Rep
Negotiate Contract
Execute Contract
N O
A


A
RFP Preparation
Data Collection & Organization
Owner Purchasing Office
Crafting Scope of Work
Owner General Council
RFP
Disclose bid opening Make-up of selection committee
Pre-Bid Meeting
Facility Tours
Receive Questions
Answer Questions
Proposals Due
Proposal Evaluation
Shortlist ESCOs for Interview
Select ESCO
ESCO Selection review by owner administration
Administration approval
ESCO Notification
B


B
Negotiate IGA
Legal Review
Owners Rep Review
RFP Third Party M&V
Proposals Due Opening
Perform IGA
Proposal Evaluation
Shortlist M&V Reps for Interview
Interview M&V Rep
Owner Receive IGA
Select M&V Rep
Owner Select ECMs
Negotiate Contract
ESCO consults SCO & DOI as needed to complete IGA. All building code updates and hazardous materials need to be identified at this point.
Execute Contract
Technical review of IGA
- Owner
- SEO
- Owner's Rep
- 3rd Party M&V
UNC BOG review and approval
Accept IGA
C


C
ESA Contract Negotiation
Draft ESA
RFP for 3rd Party financing or ESCO Provides Financing
Draft financial contract
Submit draft contracts to SEO, OSBM and Treasurer for review and comment
Prepare final documents for routing:
• ESA & IGA
• Financial contract
• Owners legal letter of opinion
Send executed packets to SEO, OSBM and TREASURER
SEO requests inclusion on COS agenda
D


D
OSBM
TREASURER
Owner provides cover letter requesting review
Owner provides certified PE letter confirming IGA calculations are accurate and achievable
Owner provides letter from 3rd party M&V that M&V protocols are appropriate for project
OSBM reviews packet and determines availability of funds
OSBM sends letter to treasurer, copies to owner and SEO stating availability of funds
This sequence assumes stand alone financing
Owner provides letter requesting approval
Treasurer reviews, determines best financing mechanism and approves
Treasurer sends approval letter to owner, copies SEO
SEO requests COS approval
COS approves project
ESA approval process complete
Owner, ESCO, SEO, SCO and DOI conduct kick-off meeting