



# Comprehensive Professional Energy Services Blanket Purchase Agreements Ordering Guide

[www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa)

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# 1.0 Introduction

The Comprehensive Professional Energy Services (CPES) Blanket Purchase Agreements (BPAs) provide a powerful tool for creating a more sustainable government and to help agencies meet their greenhouse gas reduction, water conservation and energy efficiency goals. Qualified CPES BPA holders are committed to providing innovative, cost effective, forward looking and compliant solutions.

CPES BPAs allow users to access multiple service providers that have excellent past performance. In addition to the MAS evaluation process, the CPES BPA holders have undergone an additional level of evaluation focusing on customer satisfaction. Soliciting “past performance” is not necessary because GSA has already done the legwork on behalf of federal agencies. To ensure quality, GSA collects performance information for all the contractors available under the CPES BPAs, and makes this information available to BPA users during their task order solicitation processes.

Because GSA has selected a pool of particularly qualified contractors, BPA users will need only to compete within that pool. These contractors are ready to provide agencies with quick responses, one of the benefits of working from a smaller pool of contractors. Overall, the CPES BPAs provide federal agencies with a more streamlined approach to procuring quality energy services.

## GSA designed the BPAs to facilitate the following:

**Outstanding Value** – CPES BPA holders may offer discounted labor rates. Additional discounts can be obtained at the task order level.

**Innovative Solutions from Energy Experts** – enabling federal agencies to access total energy solutions from companies possessing specialized expertise in the areas they need most.

**Customized Requirements** – include agency specific reporting or performance needs.

**Comprehensive Services from a Single Task Order** – obtain energy services and incidental Other Direct Costs (ODCs) using a single, performance-based task order.

**Dynamic Pool of Contractors** – CPES BPAs allow GSA to add contractors during the life of the BPAs, maximizing the number of participants, technical expertise and options for agencies.

**Proven Acquisition Excellence** – CPES BPAs will be administered using GSA’s proven acquisition processes to ensure compliance and efficiency. CPES BPA holder reporting requirements have already been established to make it easy for BPA users.

This guide provides the seven simple steps necessary to place an order under the terms of the CPES BPAs. A representative from GSA is always available to answer any questions that may arise, and has established a website ([www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa)) to provide BPA users helpful information, sample documents, reporting templates and contact information.

## 2.0 Seven Steps to Obtain Energy Management Services

### 2.1 Step One: Scope Determination

First, determine if the requirement is within scope of the CPES BPA. A broad range of services such as the following are included:

- Energy Management Planning and Strategies
- Training on Energy Management
- Metering Services
- Energy Program Support Services
- Building Commissioning Services
- Energy Audit Services
- Resource Efficiency Management
- Innovations in Energy
- Water Conservation
- Energy Management Services (Consolidated)
- Ancillary Repair and Alterations

More details regarding the BPA's scope, terms and conditions, BPA holders and other BPA specific information can be found at [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa). If further assistance is needed to determine whether the requirements are within scope, or if there are any other questions about the BPA, please contact Angela Lehman via e-mail at [angela.lehman@gsa.gov](mailto:angela.lehman@gsa.gov) or via phone on 703-605-9541.

### 2.2 Step Two: Prepare a Performance-Based Statement of Work (SOW)

When drafting the Performance Based SOW, here are some points to consider:

#### **Location of Work:**

CPES BPAs were issued regionally. The regions correspond to GSA's 11 national regions. Valid locations of performance for the CPES BPAs include all U.S. states and territories. When identifying place of performance, the RFQ must identify the region in which work must be performed. See [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa) for a list of the CPES BPA holders and corresponding regions in which they have been approved to work.

## Period of Performance:

The CPES BPAs were issued with the following period of performance:

Base Year:	December 31, 2009 - December 31, 2010
Option Year 1:	January 1, 2011 – December 31, 2011
Option Year 2:	January 1, 2012 December 31, 2012
Option Year 3:	January 1, 2013 – December 31, 2013 (optional based on performance)
Option Year 4:	January 1, 2014 – December 31, 2014 (optional based on performance)

The BPA period of performance will be no longer than five (5) years, consisting of a maximum one-year base period and two (2) one-year option periods; BPA holders may earn up to two (2) additional 1-year option periods (Option years 3 and 4 shown above) based on outstanding performance against the task order and BPA performance metrics and standards.

## CPES BPA Holders:

- Several CPES BPA holders have formed teaming arrangements to meet the needs of federal agencies;
- GSA has the option of adding or deleting BPA holders during the course of performance period of the BPA;
- A current listing of CPES BPA holders and detailed information regarding the on-ramping and off-ramping process for new and existing CPES BPA holders can be found at [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa).

## Reporting Requirements and Metrics:

The CPES BPAs include predefined reporting requirements and metrics. Many of these metrics are ideal for performance based tasks.

The reporting process facilitates sharing of CPES BPA Task Order status information between the BPA holders, Awarding Contracting Office staff officials, CPES BPA Contracting Office staff officials, and CPES BPA Program Management staff members. The timing of reporting aligns with other major federal reporting requirements pertaining to Recovery Act funds and supports transparency and reconciliation of data reporting.

The CPES BPA PMO predefined metrics that will be used to document acceptable levels of performance for each BPA task order will be:

<b>Metric</b>	<b>Performance Standard</b>	<b>Acceptable Level</b>	<b>Surveillance Method</b>	<b>Evaluation Method</b>
BPA Task Order Status Reports delivered complete and on-time each month	Contractor shall deliver all reports on schedule. Contractor shall compile all reports accurately and include all required data elements.	95% of reports delivered meet the standard	Actual delivery date compared to required date. Review of report contents vs. required contents	Review all reports
Compliance with Subcontracting Goals (large businesses only)	Cumulative subcontracting totals under BPA task orders meet GSA Schedule contract subcontracting goals	100% of subcontracting goals met	Comparison of reported BPA subcontracting achieved for each business type to GSA Schedule contract subcontracting goals	BPA CO reviews annually
Adherence to schedule	Contractor shall meet agreed to schedules for milestones and deliverables on all task orders	Meet schedule 95% of the time	Comparison of actual delivery date to agreed upon date after adjustments created by the Government	All deliverables as reported by task order CO
Customer Satisfaction Survey Results	Contractor conducts business professionally, minimizes disruption to normal building operations, and completes all task orders to the satisfaction of the on-site customer	Rating of 80% or higher for 95% of all task order satisfaction surveys submitted per quarter.	Customer Quarterly Survey	Review of all returned surveys
Job Creation / Retention (Comparison (if applicable for task orders using ARRA funds))	Contractor is able to retain and create jobs as proposed	85% of proposed hiring and retention levels	From ARRA required reporting information	Review by BPA CO quarterly
Energy Savings Comparison (if applicable for task orders using ARRA funds)	Completed projects result in the facilities' ability to achieve energy savings and water conservation goals	Results fully meet E.O. 13423 or its successors' standards one year after project completion	Full measurement of energy and water use for one year after project completion	Comparison of energy use baselines and/or utility bills before and after project

In addition, Awarding Agency Task Order Contracting Officers may identify and incorporate additional appropriate metrics to meet Agency specific requirements.

Visit [www.gsa.gov/energyservicebpa](http://www.gsa.gov/energyservicebpa) for a Quality Assurance Surveillance Plan (QASP) that may be used and tailored to reflect both Agency defined Task Order level and CPES BPA PMO predefined reporting requirements and metrics. In cases where Recovery Act funds are being used to fund a task order, Agencies should ensure compliance with reporting requirements that are in addition to those related to the CPES BPA.

### Special Requirements (e.g., Security, Travel):

- Note travel within the regions is at no cost to ordering agency. If travel is required outside the regions where work is performed it is negotiable with BPA holder;
- Visit [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa) for a complete listing of the CPES BPA Terms and Conditions.

## 2.3 Step Three: Prepare the Request for Quote (RFQ)

Follow your agency's usual procedures for preparing an RFQ, and consider topics such as the following:

### Task Order Value & Funding Type:

- Estimate the value of the order. For orders that are expected to exceed \$1,000,000.00 you must include language in the RFQ which indicates your intent to seek additional discounts;
- If the intent is to use Recovery Act funding in whole or **in** part, don't forget that an informational posting of the RFQ in Fedbizopps (FBO) ([www.fedbizopps.gov](http://www.fedbizopps.gov)) [ref FAR 5.704 and 8.404(e) (1)] is required.

### Evaluation Criteria:

- In crafting the best value evaluation factors, consider including some combination of technical capability, price, past performance on prior Task Orders under this BPA.

### Past Performance:

- The CPES BPA PMO will make BPA holder past performance information available to Awarding Contract Officials, eliminating the need to distribute past performance surveys to federal customers/agencies when issuing RFQs;
- The CPES BPA PMO will make available CPES BPA holder past performance information based on the data held in one or more of the following sources:
  - Past performance data gathered during the establishment of the CPES BPAs;
  - CPES BPA Task Order specific, quarterly and annual Customer Satisfaction Survey results;
  - PPIRS;
  - Other official government past performance data repositories.

### Requirements that include the procurement of products:

- If the order will require support products and/or services not requiring a statement of work, there are several options available to obtain these ancillary products:
  - GSA's Chief Acquisition Officer has signed a waiver to FAR Part 51 which allows users to authorize BPA holders to buy support products and services from other MAS contractors (including contractors not on the BPA) or through GSA Global Supply when deemed appropriate for fulfillment of agency requirements. The RFQ must include the authorization for contractors to submit pricing in this manner. Visit [www.gsa.gov/far51deviation](http://www.gsa.gov/far51deviation), for details about how this authority

- may be used. The RFQ must include the authorization for contractors to submit pricing in this manner;
- BPA holders may include "open market" items (e.g., items that have not already been priced, evaluated and awarded on the Contractor's GSA Schedule) as long as the value of "open market" items included in the order do not exceed the applicable micro-purchase threshold as defined in FAR 2.101. Ensure that the RFQ includes language that these items must be clearly identified as "open market" items, in accordance with FAR Subpart 8.402(f);
  - Some contractors have support materials under their GSA contract.

See [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa) for a sample Task Order Template, the CPES BPA Quality Assurance Surveillance Plan (QASP), a sample Quality Control Plan (QCP), FAQs, and other helpful information.

## 2.4 Step Four: Issue the RFQ

FAR Subparts 8.405-2 and 8.405-3 are applicable as are other applicable agency specific rules, regulations, policies and procedures.

Below are the dollar thresholds that dictate the number of BPA holders that must be solicited, regardless of the method used to disseminate the RFQ:

- Orders at or below micro-purchase threshold: Ordering activities may place orders directly with any BPA Holder in the designated region place of performance/location of work to be performed;
- Orders above the micro-purchase threshold and up to \$100,000: Ordering activities shall forward the requirement, or statement of work and evaluation criteria, to at least three (3) BPA Holders in the region;
- Orders above \$100,000: Ordering activities shall forward the requirement or statement of work and evaluation criteria to more than three BPA Holders.

BPA users may issue an RFQ electronically or in writing. If using GSA's eBuy application, users can easily send RFQs directly to the BPA holders electronically.

Log into the CPES BPA portal at [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa):

- a) Select the "Strategic Sourcing Aisle" link/reference. This will take you to the GSA Advantage! Login Page. You must be a registered user of GSA Advantage! to view the Strategic Sourcing aisle.
- b) Upon successfully entering your login information, you will be directed to the Strategic Sourcing aisle's Comprehensive Professional Energy Services BPA section. This link contains contact information about the BPA holders and provides the means to create an eBuy RFQ.
- c) Select "Get Quotes" or "Proceed to eBuy Step 1, "Assign Category & Select Vendors". These links will take you directly to eBuy.
- d) Click on CPES.
- e) eBuy will send your RFQ to ALL BPA Holders. At this time, you will not be able to limit the number of BPA holders receiving the RFQ if you use eBuy.

BPA holders anticipate rapid submission times, possibly within one or two days of receipt of the RFQ. Although the BPA allows for quick turn around time for RFQs, sufficient time is needed for the BPA holders to prepare a quote. If an RFQ is sent by means other than through eBuy, users can obtain the contact information for the BPA holders from the GSA Advantage! Strategic Sourcing aisle.

## 2.5 Step Five: Evaluation

After the RFQ closes, evaluate all responses received using the evaluation criteria named in the RFQ [see FAR 8.405-2(d) for additional guidance on this topic] and select the BPA holder that represents best value to the Government. Double check to make sure that the selected BPA holder covers the part of the country where the products or services are needed prior to evaluation.

## 2.6 Step Six: Award

The RFQ should now be awarded as any other Multiple Award Schedule task order. When establishing task orders, make sure that the following is documented:

- The BPA holders considered, noting the BPA Holder who received the awarded Task Order;
- If negotiations occurred, document the results of the negotiations including agreed upon pricing;
- The estimated task order value;
- If applicable, the circumstances and rationale for restricting consideration of BPA contractors to fewer than required in the ordering procedures;
- The evaluation methodology used in selecting the BPA holder to receive the Task Order;
- The rationale for any tradeoffs in making the selection;
- The fair and reasonable price determination required by Federal Acquisition Regulation (FAR) Subpart 8.405-2(d) for BPAs with hourly rate services;
- If applicable, the rationale for placing other than firm-fixed price or performance-based orders;
- The results of any performance based reviews.

### Other Helpful Hints:

- Make sure that the BPA holder's name and Schedule Contract Number(s) is included on all orders, in addition to the BPA number. In the case of Contractor Teaming Arrangements (CTAs), all BPA holders performing work on the task order should be listed;
- Provide a description of the supply or service purchased as well as the amount paid;
- Provide timely notification to unsuccessful BPA holders [See FAR Subpart 8.405-2(d) for more information];
- If requested by unsuccessful BPA holders, provide a brief explanation of the basis for the award decision, if the evaluation includes non-price factors [FAR Subpart 8.504-2(d)];
- If mixed funding (Recovery Act and non-Recovery Act funds on the same task order) is used, be sure to clearly segregate these sources in the task order. One way to accomplish that is to use different line items based on funding source. See FAR Subpart 8.404 and 5.704 for more on Recovery Act requirements;
- If funded by the American Recovery and Reinvestment Act of 2009 (Pub. L. 11-5) and over \$500,000, publicize award notice [FAR Subparts 8.404(e) (2) and 5.705(a)];
- If funded by the American Recovery and Reinvestment Act of 2009 (Pub. L. 11-5) regardless of dollar value, task order award notice with rationale must be publicized if the order is Time & Material or Labor Hour type or awarded under a Limited Sources Justification [FAR Subpart 5.705(b)].

## 2.7 Step Seven: Task Order Administration

The CPES BPA requires that the Awarding Agency Task Order Contracting Officer use all standard task order administration practices such as:

- Surveillance and monitoring;
- Performance Assessment;
- Timely invoicing processes.

As mentioned in Step 3, The CPES BPA includes a predefined reporting and metric collection process that will support an Award Agency Contracting Officer's surveillance and assessment roles. Because CPES task orders are performance based, each task order will require surveillance using a QASP and a BPA holder created QCP. GSA has developed a QASP that can be tailored to a user's unique requirements. In addition, a sample QCP has also been developed. Visit [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa) to obtain soft copies of both.

The predefined reporting requirements for the CPES BPA are shown below:

Report(s)	Due Date	Report Initiator	Recipient(s)
Written notification of new task order (includes –Task Order Name and Number; Name of Funding Agency POC; Name of Award Agency POC; Period of Performance; Estimated dollar value) Complete copy of task order	Within five (5) days of award	BPA Holder	BPA Contracting Officer; BPA Project Manager; BPA Contracting Officer's
Monthly Task Order Status Report **(See Attachment A of this document for a sample version of this report)	15 <sup>th</sup> of the following month	BPA Holder	BPA Contracting Officer; BPA Project Manager; BPA Contracting Officer's Representative; Task Order Contracting Officer (courtesy copy-no action required)
Task Orders utilizing Recovery Funds	NLT Day 10 after the end of each quarter (April, June, September, December)	BPA Holder	<a href="http://www.FederalReporting.gov">www.FederalReporting.gov</a>
Awarding Agency Contracting Officer – Task Order Summary Report	20 <sup>th</sup> of the month following the end of each quarter (April, June, September, December)	CPES BPA Program Office	Awarding Agency Contracting Officer Awarding Agency COR
Customer Satisfaction Report (See Attachment B of this document for a sample)	29 <sup>th</sup> of the month following the each of each quarter (April, June, September, December)	Awarding Agency Contracting Officer	BPA Contracting Officer; BPA Project Manager; BPA Contracting Officer's Representative; Task Order Contracting Officer

As mentioned in Step 3, Awarding Task Order Contracting Officers may also negotiate with BPA holders to include additional appropriate metrics to meet Agency specific requirements. Such metrics should be incorporated into the task order QASP and BPA holder performance should be monitored using the appropriate vendor surveillance practices.

Using these seven steps will result in a successful award that meets your requirements. For more information, visit [www.gsa.gov/energyservicesbpa](http://www.gsa.gov/energyservicesbpa) or contact Angela Lehman via e-mail at [angela.lehman@gsa.gov](mailto:angela.lehman@gsa.gov) or via phone on 703-605-9541.

BPA specific information can be found on our website. Please visit for up-to-date information on the following:

- CPES Contact Information;
- CPES BPA SIN List;
- Listing of GSA Regions and BPA Holders by Region;
- Frequently Asked Questions;
- Sections B & C of the RFQ (Term and Conditions);
- Quality Assurance Surveillance Plan;
- Performance and Reporting Guidelines;
- Monthly Status Report Template;
- Customer Satisfaction Survey Template;
- Invoice Payment Process;
- The Correlation of Laws/Regulations with Performance Matrix;
- Sample Agency Task Order Template



### 3.2 Initial Metrics from RFQ

Metric	Performance Standard	Acceptable Level	Surveillance Method	Evaluation Method
ARRA and BPA dollar volume reports delivered complete and on-time each week/quarter	Contractor shall deliver all reports on schedule. Contractor shall compile all reports accurately and include all required data elements.	95% of reports delivered meet the standard	Actual delivery date compared to required date. Review of report contents vs. required contents	Review all reports on a regional basis and roll up to national level
Compliance with Subcontracting Goals (large businesses only)	Cumulative subcontracting totals under BPA task orders meet GSA Schedule contract subcontracting goals	100% of subcontracting goals met	Comparison of reported BPA subcontracting achieved for each business type to GSA Schedule contract subcontracting goals	BPA CO reviews annually
Adherence to schedule	Contractor shall meet agreed to schedules for milestones and deliverables on all task orders	Meet schedule 95% of the time	Comparison of actual delivery date to agreed upon date after adjustments created by the Government	All deliverables as reported by task order CO
Customer Satisfaction	Contractor conducts business professionally, minimizes disruption to normal building operations, and completes all task orders to the satisfaction of the on-site customer	Rating of 80% or higher	Customer post project survey	Review of all returned surveys
Job Creation	Contractor is able to retain and create jobs as proposed	85% of proposed hiring and retention levels	From ARRA required reporting information	Review by BPA CO quarterly
Energy Savings	Completed projects result in the facilities' ability to achieve energy savings and water conservation goals	Results fully meet E.O. 13423 or its successors' standards one year after project completion	Full measurement of energy and water use for one year after project completion	Comparison of energy use baselines and/or utility bills before and after project completion

# 4.0 Attachment B

## 4.1 Customer Satisfaction Survey

Contractor Name: \_\_\_\_\_

Task Order Name & Number: \_\_\_\_\_

Awarding Office Contracting Officer: \_\_\_\_\_

Reporting Period: \_\_\_\_\_

## 4.2 Task Order Solicitation Process Details

Names of BPA Holders Who were sent this RFQ	
Method used to distribute RFQs	
Names of BPA Holders Who Submitted Proposals	
Length of Solicitation Process (From RFQ Release to Award)	

### 4.3 Color Rating

For each task order, on a quarterly basis, the Government will annotate the level of contractor performance (based on contractor surveillance and performance measured against contractor QCP) and provide a consensus adjectival color rating as indicated in the chart below.

<b>Adjectival Color</b>	<b>Numeric Rating Equivalent</b>	<b>Rating</b>	<b>Rating Description</b>
<b>Blue</b>	90-100	Excellent	Exceeds performance standards - The contractor's work far exceeds the requirement of the Task Order contract by consistently exhibiting excellent performance, typically meets, and regularly exceeds the contract requirements
<b>Green</b>	80-89	Acceptable	Meets performance standards - The contractor provides an acceptable level of performance consistently meeting the contract requirements.
<b>Yellow</b>	70-79	Marginal	Fails to meet minimum performance standards - The contractor performs slightly below the requirements of the contract, meeting the requirements on an intermittent basis.
<b>Red</b>	69 or less	Unacceptable	Fails to meet performance standards - The contractor fails to meet important contract requirements, resulting in a negative impact on the entire project.

Contractor Name: \_\_\_\_\_

Task Order Name & Number: \_\_\_\_\_

Awarding Office Contracting Officer: \_\_\_\_\_

Reporting Period: \_\_\_\_\_

<b>Criteria Being Assessed</b>	<b>Adjectival Color Rating</b>	<b>Comments</b>
<b>BPA Predefined Metrics:</b>		
Adherence to schedule		
Quality of performance and adherence to requirement		
Timeliness and quality of data input into federal reporting.gov		
Compliance with subcontracting goals		
Job Creation / Retention*		
Energy Savings comparison (annually, if applicable)*		
<b>Agency Defined Metrics (if applicable**)</b>		
Performance against Agency defined metric #1 (Provide the name & a brief description of each agency defined metric)		
Performance against Agency defined #2 (Provide the name & a brief description of each agency defined metric)		
(Add more rows for Agency defined metrics as required)		
<b>OVERALL SATISFACTION RATING</b>		

\* For Task Orders using ARRA funds

\*\* Agencies may negotiate, at the Task Order level, additional metrics or tightening of the BPA level metrics that are identified above. Such Agency defined metrics and standards should be incorporated into the QASP and added to the above mentioned section.

COMMENTS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_