**MONTANA ENERGY PERFORMANCE CONTRACTING PROGRAM**

**EPC COMPLETION CHECKLIST**

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| Project Title:  | No. |
| Entity:  | Facility: |
| √ | **ACTION:** |
|  | 1. | Sub-contractor: Written notice of completion to ESP. |
|  | 2. | ESP Inspection -- Establishes punch list. |
|  | 3. | Sub-contractor completes punch list, and requests final inspection. |
|  | 4. | ESP confirms completion of punch list. |
|  | 5. | ESP issues Notice of Commencement of Energy Cost Savings for Entity approval. |
|  | 6. | Final inspection: ESP, Utility, & Entity - (Items found after final inspection will be placed on warranty list unless item significantly impairs operation of facility.) |
|  | 7. | ESP provides punch list completion schedule and completes work identified on punch list. |
|  | 8. | Entity confirms receipt of certificates, permits, manuals, and training for: |
|  |  | a. | Electrical Inspection |  | e. | Operator Training |  |
|  |  | b. | Boiler Inspection |  | f. | Post-Installation M&V Report |  |
|  |  | c. | Air Quality Inspection |  | g. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  |  | d. | O&M Manuals |  | h. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | 9. | Substantial Completion (If partial completion, attach letter describing phase or segment included in substantial completion). Warranty period begins on the date of substantial completion for the phase or segment included |
|  |  | Substantial Completion Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | 10. | Entity confirms receipt from ESP: |
|  |  | a. | As-built Drawings |  | f. | Spare material and parts |  |
|  |  | b. | Shop Drawings |  | g. | Commissioning/Balancing Reports |  |
|  |  | c. | Test Reports |  | h. | Warranty responsibility contacts |  |
|  |  | d. | Disposal Manifests |  | i. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  |  | e. | Certificate of Warranty |  | j. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | 11. | All change orders approved and processed. |
|  | 12. | ESP provides accounting of final costs, along with final invoices if not previously submitted. |
|  | 13. | Utility written acceptance, as required. |
|  | 14. | Facility representative written acceptance (if required). |
|  | 15. | Entity fills out Certificate of Acceptance Form and obtains appropriate signatures. This establishes final acceptance date. |
|  | 18. | Entity approves ESP retainage invoice. |
|  | 19. | Entity: |
| • Receives approved invoice and Affidavit of Wages Paid.• Verifies that there are no current claims against the contractor.• Releases correct amount of retainage from escrow after retainage period. |
|  | 20. | Entity amends ESP agreement to contract for M&V of project performance. |
|  | 21. | ESP satisfies warranty items as required and performs M&V of project performance. |
|  | 22. | Close construction file and continue to review M&V of project performance. |

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| NOTE: | If ESP has not completed the punch list and items 8 and 10 above on schedule, the following steps (in the order shown) should be considered. |
|  | 1. | Withhold progress payment for work not completed. |
|  | 2. | Negotiate revised punch list completion schedule with the ESP and evaluate performance. |
|  | 3. | Entity may send letter to bonding company requesting they complete the project. |