CORE CONCEPT

Energy Performance Contracting and ESCO Training Course: Shared Savings, IPMVP M&V and Financing

3 – 7 May 2027
London - Central London four-star

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Introduction:

Energy performance contracting and ESCO training, covering shared savings, IPMVP M&V and financing, is a 1-week course for ESCO commercial and engineering staff and for public building owners and facility units, ending with an Energy Performance Contract Plan for a case organisation. Large retrofits stall when owners cannot compare savings-guarantee and shared savings offers, baselines are disputed and lenders doubt the savings stream. Nominees already scope retrofits or manage building portfolios and learn through case studies on audit reports, savings schedules and contract drafts. CoreConcept Training Center delivers this energy performance contracting course.

Course Objectives:

- Compare savings-guarantee, shared savings and energy service agreement structures and select the contract family that fits an owner's balance sheet and risk appetite
- Specify and review an investment-grade audit that converts energy conservation measures into a bankable savings schedule
- Draft an IPMVP measurement and verification plan with a measurement boundary, adjusted baseline and reporting period for each retrofit measure
- Allocate performance, operational and financial risks between owner, ESCO and lender through a risk and responsibility matrix and contract clauses
- Structure ESCO project financing using third-party funding, receivables forfaiting and savings-funded repayment, and test the cash flow against savings shortfalls
- Resolve savings verification disputes using non-routine adjustments, reconciliation statements and escalation steps

Target Audience:

- Professionals responsible for developing, pricing and selling performance-based retrofit projects within energy service companies
- Engineering staff responsible for investment-grade audits, retrofit design and savings calculations for ESCO bids
- Public and private building owner units responsible for procuring and approving large energy retrofit contracts
- Facility and estate management staff responsible for operating retrofitted assets and reporting savings to contract owners
- Finance and project appraisal staff responsible for evaluating savings-funded investments and lender requirements

Course Outline:

Day 1: ESCO Business Models and the Performance Contracting Landscape

- ESCO Value Chain From Audit to Long-Term Savings Delivery
- Savings Guarantee Versus Shared Savings Contract Families Compared
- Energy Service Agreements and Chauffage Supply-Based Arrangements
- Public Building Owner Drivers for Savings-Funded Retrofit Projects
- Retrofit Portfolio Screening Matrix for Performance Contract Suitability

Day 2: IPMVP Framework, Baselines and Investment-Grade Audit Methods

- IPMVP Measurement Boundary and Savings Determination Principles
- IPMVP Options A and B for Retrofit Isolation Measures
- IPMVP Option C Whole Facility and Option D Calibrated Simulation
- Investment-Grade Audit Scope Versus Preliminary Walk-Through Assessment
- Baseline Period Data Set and Independent Variable Selection

Day 3: Procurement, Savings Schedules and Contract Structuring

- ESCO Procurement Route Using Request for Qualifications and Proposals
- Energy Conservation Measure Bundling to Balance Payback Periods
- Savings Schedule Build With Cost Avoidance and Escalation Rates
- Risk and Responsibility Matrix for Owner, ESCO and Lender
- Performance Contract Clauses for Shortfall Payment and Excess Savings Split

Day 4: Project Financing, Verification Disputes and Contract Risk

- Third-Party Financing and Off-Balance-Sheet Treatment Options
- Receivables Forfaiting and Savings-Funded Repayment Cash Flow Model
- Non-Routine Baseline Adjustments for Occupancy and Floor Area Changes
- Annual Savings Reconciliation Report and Shortfall Calculation
- Savings Dispute Escalation From Technical Review to Expert Determination

Day 5: Case Study Build of the Energy Performance Contract Plan

- Case Study of a Hospital Chiller and Lighting Retrofit Offer
- Case Study of a University Campus Shared Savings Proposal
- Case Study of a Disputed Baseline After Occupancy Change
- Contract Family Choice and Financing Route for Case Organisation
- Energy Performance Contract Plan With M&V Plan and Risk Matrix

Skills You Will Gain:

- Performance Contract Structuring
- Investment-Grade Audit Review
- Savings Baseline Adjustment
- Measurement and Verification Planning
- ESCO Risk Allocation
- Savings-Funded Project Financing
- Savings Reconciliation Analysis
- Verification Dispute Resolution

Why Attend This Course:

- Deliver an Energy Performance Contract Plan to the estate director and finance committee, with the chosen contract family, M&V plan and risk matrix
- Choose between savings-guarantee and shared savings offers, and between owner and ESCO financing, on evidence rather than vendor preference
- Avoid unbankable savings schedules, baseline disputes and shortfall claims that delay payments and erode trust between owner and ESCO
- Brief procurement, engineering and finance colleagues on IPMVP options, savings reconciliation and contract clauses for future retrofit tenders

Conclusion:

Back at work, the participant gives the estate director, the finance committee and the procurement unit an Energy Performance Contract Plan. Procurement uses it to issue a performance-based tender, finance uses its savings schedule and financing route to approve the investment, and the facility team uses its M&V plan to agree the baseline with the selected ESCO. After the first annual savings reconciliation, the team should review whether measured savings met the schedule, which adjustments were claimed and whether the risk matrix needs revising.

Frequently Asked Questions FAQ:

What should participants know before an energy performance contracting and ESCO course?

Participants should already work with building energy data, retrofit projects or contract procurement. Bringing an anonymised utility history, an audit report or a draft ESCO proposal helps them apply the baseline, savings schedule and contract exercises to a real case.

How does an energy performance contracting and ESCO course differ from a general energy management course?

It focuses on the contract, financing and verification arrangements that let an outside company fund and guarantee retrofit savings. General energy management courses cover site energy policy, audits and performance indicators, so audit methods appear here only as inputs to a bankable savings schedule.

Why does energy performance contracting depend on IPMVP measurement and verification?

Savings cannot be measured directly, only determined by comparing baseline and reporting period energy use after adjustments. IPMVP gives owner, ESCO and lender one agreed method, so payments, shortfall claims and excess savings shares rest on figures all parties accept.

What do participants take back from the energy performance contracting and ESCO course?

Participants take back an Energy Performance Contract Plan for a case organisation, with a contract family choice, savings schedule, IPMVP M&V plan, risk and responsibility matrix and financing route they can adapt to their own retrofit portfolio.