

# Checklist for making an offer or responding to a tender for the services based on the Total Concept method

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Total Concept

## Checklist for making an offer or responding to a tender for the services based on the Total Concept method

This document is targeted for consultants and other companies planning to offer Total Concept services for a building owner or client. If you are a client planning for Total Concept project and drawing up the tender documents please check “*Checklist for tender documents for Step 1 of a Total Concept method*”<sup>1</sup>.

This document focuses on services for Step 1 in the Total Concept method but also some additional information is provided for the other steps in the process that may be included as an option to the same offer.

It is recommended to include to an offer or a reply for a tender for Total Concept project the following information:

1. A brief description of the Total Concept method, its work process and benefits (*in the case the offer is not made as part of a tender competition for a Total Concept project*)
2. Description of the project scope and aim, including building owners expectations (*if defined*)
3. Description of services included to the offer, roles and responsibilities of consultant during the project process and project outcomes
4. Description of the expected work load for the different services included (e.g. different activities) and associated cost
5. Planned time schedule of the project
6. Description of consultant’s resources, competency and experience

### 1. Description of the Total Concept method

In many cases the potential client may not know the Total Concept method or does not have detailed understanding about it. In this kind of case it is important to include a basic description of the method to the offer, preferably as a separate document, including the following information:

- Summary of the method, its benefits and work process
- Brief overview of the economic principles of the method and why setting up targets as an internal rate of return has been chosen
- Examples of expected results of Step 1 as well as of the whole project if the building owner decides to execute the action package

A good example of a short method description of the method can be found for instance in “*Total Concept Brochure*” that can be found in the Marketing Kit as a pdf and as text documents. The benefits with the method are described more in detail in “*Market potential and business opportunities with the Total Concept*” and “*Information Leaflet for Building Owners*” that can also be found from the Total Concept marketing kit.

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<sup>1</sup> Total Concept tool-kit, [www.totalconcept.info](http://www.totalconcept.info)

## 2. Project scope and aim

Writing down the project scope and aim including assumed expectations and targets of the building owner in the renovation gives both parties visibility over the task, project requirements and clients goals they wish to achieve with the project. This also convinces building owner that the consultant is really understood their needs. Therefore, it is really useful to type these down at least to that extent that is possible based on conversations and materials provided by the potential client.

## 3. Services included to the offer, roles and responsibilities of a consultant during the project process and project outcomes

Description of the services included to the offer and what will be delivered is a core part of an offer. Here the level of details depends of course on the project and what is already specified in the tender documents. It is recommended to specify what work will be carried out and what roles and responsibilities the service provider will take so that the client has a better understanding of the project scope and resources needed.

For example the main tasks for a consultant carrying out Step 1 comprises the following:

- Gathering of basic information about the building and compiling technical data.
- Carrying out an energy audit and establishing a current status of the building including both building envelope and technical installations. It should also be defined if tenant's own installations are included to the analysis of measures.
- Drawing up a list of all technically and practically possible measures that can significantly reduce the use of energy.
- Establishing a baseline or a reference level for what the evaluated savings of the identified energy efficiency measures are compared to.
- Carrying out investment cost calculations for each individual measure and taking into account how the implementation of measures as an action package affects the costs.
- Carrying out energy calculations with a validated calculation software for the building as it is to get a calibrated model, for each individual measure as well as for the package.
- The composition of an action package according to the Total Concept method using the Total Concept calculation tool TotalTool. The results are illustrated on an internal rate of return diagram.
- Forming of the report about Step 1 that provides a solid basis for further decision making.

If the consultant carrying out Step 1 also offer services as a Total Concept manager the task list can be complemented with the following:

- Coordinating the tasks and activities carried out and the hand-over between the different key actors during the three steps of the Total Concept method
- Planning and coordinating the functional performance checks and follow-up phase (Step 3) (if included)
- Supporting the property owner/client in decision making process regarding technical and economic issues influencing the outcomes of the Total Concept project, when required represents the client in relation to the technical consultants and contractors (when required).

In case the consultant does not take the role as a Total Concept manager it is important to point out to the client that to ensure the successful outcomes responsibility of the Total Concept manager tasks should be covered by someone in the project.

The building owner need to understand what will be required from them to ensure that the project can be successfully carried out and that expected results can be achieved. Successful implementation of Total Concept will require both information and collaboration with several building stakeholders. Therefore a brief description of the required information needed from the client's side to support the calculations can be added to the offer as an appendix.

The offer should also specify how the outcomes will be reported. This will make the results more easily understandable for the potential client. The documentation from Step 1 should provide building owner a solid basis for investment decisions.

More information about the information needed from the property owner's side and reporting the outcomes of Step 1 can be found from the "*Total Concept Guide Book*."<sup>2</sup>

#### **4. Expected work load for the different services included and associated cost**

The offer should specify the expected work load (hours) needed for the different tasks that are included to the offer as well as other associated costs (e.g. travel costs). Carrying out a pre-study, Step 1 in the Total Concept method, is often more comprehensive than traditional pre-studies methods used in energy renovations. This is because a Total Concept project aims to have a high reliability of the results and in order to reduce the uncertainty of the results more resources are often needed. Building owners that are order their first Total Concept project may not have good understanding of the workload. A clear overview of the required work load can help to motivate the investments cost needed for a pre-study phase (Step 1).

Expected work load for carrying out Step 1 in a Total Concept project varies depending on building size and complexity as well as depending on the level of details expected by the client. In very large or complicated buildings an additional pre-evaluation may be needed in order to correctly pricing the work to be carried out.

More information about can be found in the "*Market potential and business opportunities with the Total Concept*".

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<sup>2</sup> Total Concept tool-kit, [www.totalconcept.info](http://www.totalconcept.info)

## 5. Planned time schedule of the project

In order to provide a client an understanding on how long time the pre-study phase, Step 1, will take the offer should also specify a preliminary time schedule, including at least a proposed starting date and delivery date of the outcomes. Also expected number of meetings with different actors and important milestones should preferably be specified.

Make sure that at least two meeting is needed between the client and consultant. One there the baseline, expectations and targets are discussed and one meeting there the results from step1 is presented.

## 6. Description of consultant's resources, competency and experience

In an offer consultants (service providers) should also provide following information about their company, resources and competence:

- General description of the services provided by the consultancy company and how it is connected to the services provided in the offer
- The consultant's personal experience of energy efficiency improvement work in non-residential buildings similar to that in the assignment (in a specified types of buildings and complexity). Providing three latest reference projects with short description and contact details is recommended.
- The consultant's resources and competency regarding the services included to the offer, e.g. energy auditing, energy calculations, cost estimations, etc. In case an offer is made for Step 1 then it should also be specified which approved calculation programs are to be used and what experience the consultant has of energy calculations similar to those required by the Total Concept method.
- Description of the service provider's routines/systems for quality assurance.

More information about the competence and experiences required for consultants in Step 1 and for a Total Concept manager can be found in the *"Market potential and business opportunities with the Total Concept"*.