

# Energy Performance Rating Sheet

Entity E3

Date of Rating \_\_\_\_\_

Name of Respondent \_\_\_\_\_

Evaluator's Name Evaluator 1

**Experience** -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed energy performance projects	20	<u>15</u>	
2. Has worked on funded construction projects	15	<u>7</u>	
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10		
4. Extent of experience in financial sourcing	15	<u>8</u> <u>10</u>	
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>40</u></b>	

**Work Performance (References)**

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	<u>5</u>
2. Manages projects within budgetary constraints	5	<u>5</u>
3. Work product is of high quality	10	<u>5</u>
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>15</u></b>

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

**Capacity to Perform**

Factor	Max.Pts.	Score
1. Staff Level / Experience of Staff	5	<u>5</u>
2. Adequacy of Resources	5	<u>5</u>
3. Professional liability insurance is in force	5	<u>5</u>
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>15</u></b>

**TOTAL SCORE**

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>40</u>
<input type="checkbox"/> Work Performance	25	<u>15</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
<b>Total Score</b>	<b>100</b>	<b><u>70</u></b>

Interview Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

## Energy Performance Rating Sheet

Entity E3

Date of Rating 9/29/22

Name of Respondent \_\_\_\_\_

Evaluator's Name

EVALUATOR 2

**Experience** -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed energy performance projects	20	<u>15</u>	Many ISD's in area All over Texas 13 total in Texas
2. Has worked on funded construction projects	15	<u>15</u>	
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10	<u>10</u>	
4. Extent of experience in financial sourcing	15	<u>10</u>	SECO - Lone STAR 21 reimbursements
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>50</u></b>	

**Work Performance (References)**

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	<u>10 -</u>
2. Manages projects within budgetary constraints	5	<u>5 -</u>
3. Work product is of high quality	10	<u>10 -</u>
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>25</u></b>

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

**Capacity to Perform**

Factor	Max.Pts.	Score	Comments
1. Staff Level / Experience of Staff	5	<u>5</u>	63 employees
2. Adequacy of Resources	5	<u>5</u>	
3. Professional liability insurance is in force	5	<u>5</u>	
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>15</u></b>	

**TOTAL SCORE**

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>50</u>
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
<b>Total Score</b>	<b>100</b>	<b><u>90</u></b>

Interview Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

# Energy Performance Rating Sheet

Entity E3

Date of Rating 9/29/22

Name of Respondent \_\_\_\_\_

Evaluator's Name EVALUATOR 3

## Experience – Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed energy performance projects	20	<u>20</u>	
2. Has worked on funded construction projects	15	<u>15</u>	
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10		
		<u>10</u>	
4. Extent of experience in financial sourcing	15	<u>10</u>	
		<u>10</u>	
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>55</u></b>	

ASSUMPTION THEY WERE FUNDED

GRANTS, LOANS, @ LOW INTEREST RATES

## Work Performance (References)

Factor	Max.Pts.	Score	Comments
1. Past projects completed on schedule	10	<u>0</u>	
2. Manages projects within budgetary constraints	5	<u>0</u>	
3. Work product is of high quality	10	<u>10</u>	
		<u>10</u>	
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>10</u></b>	

UNKNOWN  
UNKNOWN  
UNKNOWN-GIVE ALL 10

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

## Capacity to Perform

Factor	Max.Pts.	Score	Comments
1. Staff Level / Experience of Staff	5	<u>2</u>	
2. Adequacy of Resources	5	<u>5</u>	
3. Professional liability insurance is in force	5	<u>0</u>	
		<u>7</u>	
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>7</u></b>	

NOT DEMONSTRATED

## TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>55</u>
<input type="checkbox"/> Work Performance	25	<u>10</u>
<input type="checkbox"/> Capacity to Perform	15	<u>7</u>
<b>Total Score</b>	<b>100</b>	<b><u>72</u></b>

Interview Notes:

1. NOTES ON BACK
- 2.
- 3.
- 4.
- 5.
- 6.

# NOTES

BIDS EX.

DIDN'T SELL BUSINESS

GRANT PROGRAM

NO CHANGE ORDERS

NO LITIGATION

DON'T LIST TIME IN POSITION - ADAM ANDERS TIME IN POS.

2 PHASE RETRO

# Energy Performance Rating Sheet

Entity E3

Date of Rating 9/29/22

Name of Respondent \_\_\_\_\_

Evaluator's Name \_\_\_\_\_

Evaluator 4

**Experience** -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score
1. Has previously designed energy performance projects	20	<u>18</u>
2. Has worked on funded construction projects	15	<u>15</u>
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10	
4. Extent of experience in financial sourcing	15	<u>10</u>
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>53</u></b>

Comments

mostly ISD's

Alvin  
Bay City  
Needville  
Galena Park

**Work Performance (References)**

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	<u>10 -</u>
2. Manages projects within budgetary constraints	5	<u>5 -</u>
3. Work product is of high quality	10	<u>10 -</u>
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>25 -</u></b>

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

**Capacity to Perform**

Factor	Max.Pts.	Score
1. Staff Level / Experience of Staff	5	<u>5</u>
2. Adequacy of Resources	5	<u>4</u>
3. Professional liability insurance is in force	5	<u>0</u>
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>9</u></b>

**TOTAL SCORE**

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>53</u>
<input type="checkbox"/> Work Performance	25	<u>25 -</u>
<input type="checkbox"/> Capacity to Perform	15	<u>9</u>
<b>Total Score</b>	<b>100</b>	<b><u>87</u></b>

Interview Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.



# Energy Performance Rating Sheet

Entity E3

Date of Rating 9-29-22

Name of Respondent \_\_\_\_\_

Evaluator's Name EVALUATOR 5

**Experience** -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed energy performance projects	20	<u>20</u>	
2. Has worked on funded construction projects	15	<u>15</u>	
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10		
4. Extent of experience in financial sourcing	15	<u>5</u>	<u>all work @ L.S.D.</u> <u>small RE-USE</u>
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>40</u></b>	

## Work Performance (References)

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	_____
2. Manages projects within budgetary constraints	5	_____
3. Work product is of high quality	10	_____
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>25</u></b>

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

## Capacity to Perform

Factor	Max.Pts.	Score
1. Staff Level / Experience of Staff	5	<u>2</u>
2. Adequacy of Resources	5	<u>2</u>
3. Professional liability insurance is in force	5	<u>5</u>
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>9</u></b>

## TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>40</u>
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>9</u>
<b>Total Score</b>	<b>100</b>	<b><u>74</u></b>

Interview Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

# Energy Performance Rating Sheet

Entity E3

Date of Rating \_\_\_\_\_

Name of Respondent \_\_\_\_\_

Evaluator's Name Evaluator 6

## Experience -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed energy performance projects	20	<u>20</u>	
2. Has worked on funded construction projects	15	<u>15</u>	
3. Has worked on projects that were located in this general region. Note: Location may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR200.319(b)	10		
		<u>8</u>	
4. Extent of experience in financial sourcing	15	<u>13</u>	
<b>Subtotal, Experience</b>	<b>60</b>	<b><u>51</u></b>	<b>56</b>

## Work Performance (References)

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	<u>10</u>
2. Manages projects within budgetary constraints	5	<u>5</u>
3. Work product is of high quality	10	<u>10</u>
<b>Subtotal, Performance</b>	<b>25</b>	<b><u>25</u></b>

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

## Capacity to Perform

Factor	Max.Pts.	Score
1. Staff Level / Experience of Staff	5	<u>5</u>
2. Adequacy of Resources	5	<u>5</u>
3. Professional liability insurance is in force	5	<u>5</u>
<b>Subtotal, Capacity to Perform</b>	<b>15</b>	<b><u>15</u></b>

## TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>51</u>
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
<b>Total Score</b>	<b>100</b>	<b><u>96</u></b>

Interview Notes:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.