

Energy Performance Rating Sheet

Entity Way Services

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>10</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>4</u> <u>10</u>	
Subtotal, Experience	60	<u>39</u>	

Work Performance (References)

Factor	Max.Pts.	Score
1. Past projects completed on schedule	10	<u>6</u>
2. Manages projects within budgetary constraints	5	<u>5</u>
3. Work product is of high quality	10	<u>7</u>
Subtotal, Performance	25	<u>18</u>

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>4</u>
2. Adequacy of Resources	5	<u>4</u>
3. Professional liability insurance is in force	5	<u>3</u>
Subtotal, Capacity to Perform	15	<u>11</u>

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>39</u>
<input type="checkbox"/> Work Performance	25	<u>18</u>
<input type="checkbox"/> Capacity to Perform	15	<u>11</u>
Total Score	100	<u>68</u>

Interview Notes:

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

Energy Performance Rating Sheet

Entity Way Services

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>20</u>	Citys, Water/ww similar applications few in region many in TX
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>15</u>	Municipal leasing guaranteed savings contracts
Subtotal, Experience	60	<u>55</u>	

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>
Subtotal, Performance	25	<u>25</u>

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>	Plenty exp.
2. Adequacy of Resources	5	<u>5</u>	
3. Professional liability insurance is in force	5	<u>5</u>	
Subtotal, Capacity to Perform	15	<u>15</u>	

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>55</u>
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
Total Score	100	<u>95</u>

Interview Notes:

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

Energy Performance Rating Sheet

Entity Way Services

Date of Rating 9/29/22

Name of Respondent _____

Evaluator's Name I 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>	ASSUMPTION THEY WERE FUNDED
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>5</u>	
4. Extent of experience in financial sourcing	15	<u>5</u>	LEASING / BONDS - NOT MUCH DIVERSITY
Subtotal, Experience	60	<u>45</u>	

Work Performance (References)

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

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>	
2. Adequacy of Resources	5	<u>3</u>	
3. Professional liability insurance is in force	5	<u>0</u>	NOT DEMONSTRATED
Subtotal, Capacity to Perform	15	<u>8</u>	

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>45</u>
<input type="checkbox"/> Work Performance	25	<u>10</u>
<input type="checkbox"/> Capacity to Perform	15	<u>8</u>
Total Score	100	<u>63</u>

Interview Notes:

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

NOTES

1918 | 45 VPS

NO LITIGATION

NO CHANGE OF BUS.

Energy Performance Rating Sheet

Entity Way Services

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	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>10</u> <u>15</u>	Houston Van Vleck Hempstead Galveston
Subtotal, Experience	60	<u>60</u>	

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>
Subtotal, Performance	25	<u>25 -</u>

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>3</u>
2. Adequacy of Resources	5	<u>5</u>
3. Professional liability insurance is in force	5	<u>0</u>
Subtotal, Capacity to Perform	15	<u>8</u>

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>60</u>
<input type="checkbox"/> Work Performance	25	<u>25 -</u>
<input type="checkbox"/> Capacity to Perform	15	<u>8</u>
Total Score	100	<u>93</u>

Interview Notes:

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

Energy Performance Rating Sheet

Entity Way Services

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>3</u> <u>0</u>	<u>NOT APPLICABLE</u>
Subtotal, Experience	60	<u>38</u>	

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	
Subtotal, Performance	25	<u>25</u>

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>
Subtotal, Capacity to Perform	15	<u>15</u>

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>38</u>
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
Total Score	100	<u>78</u>

Interview Notes:

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

Energy Performance Rating Sheet

Entity Way Services

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>9</u>	
4. Extent of experience in financial sourcing	15	<u>13</u>	
Subtotal, Experience	60	<u>52</u> 57	

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>
Subtotal, Performance	25	<u>25</u>

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>
Subtotal, Capacity to Perform	15	<u>15</u>

TOTAL SCORE

Factor	Max.Pts.	Score
<input type="checkbox"/> Experience	60	<u>52</u> 57
<input type="checkbox"/> Work Performance	25	<u>25</u>
<input type="checkbox"/> Capacity to Perform	15	<u>15</u>
Total Score	100	<u>92</u> 97

Interview Notes:

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