

RFP Evaluation Results

2021-037-6904 Third Party Administrator for PACE Program

Title 2021-037-6904 Third Party Administrator for PACE Program

Closing Date Aug 19, 2021 1:00:00 PM MDT

Max Score 100

Notes

Auction #RFP - 2021-037-6904 - Third-Party Administrator for PACE (Property Assessed Clean Energy) Program

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	25 of 25	25%	25 of 25 pts
Administrative Fee Structure	30%	30 of 30	30%	30 of 30 pts
Project Approach and Understanding	30%	28 of 30	28%	28 of 30 pts
Small Business Enterprise (SBE)	15%	10 of 15	10%	10 of 15 pts
		93 of 100	93%	93 of 100 pts

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	18.67 of 25	18.67%	18.67 of 25 pts
Administrative Fee Structure	30%	30 of 30	30%	30 of 30 pts
Project Approach and Understanding	30%	23 of 30	23%	23 of 30 pts
Small Business Enterprise (SBE)	15%	0 of 15	0%	0 of 15 pts
		71.67 of 100	72%	71.67 of 100 pts

RFP Evaluation
2021-037-6904 Third Party Administrator for PACE Program
Capability and Expertise

Title Capability and Expertise

Weight 25%

Scale 25

Notes

RFP Evaluation
2021-037-6904 Third Party Administrator for PACE Program
Administrative Fee Structure

Title Administrative Fee Structure

Weight 30%

Scale 30

Notes

RFP Evaluation
2021-037-6904 Third Party Administrator for PACE Program
Project Approach and Understanding

Title Project Approach and Understanding

Weight 30%

Scale 30

Notes Project Approach and Understanding, (Referencing Section 4, Desired Scope of Service)

RFP Evaluation
2021-037-6904 Third Party Administrator for PACE Program
Small Business Enterprise (SBE)

Title Small Business Enterprise (SBE)

Weight 15%

Scale 15

Notes

User RFP Evaluation Results

2021-037-6904 Third Party Administrator for PACE Program

Rosa Rodriguez

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	No Data		
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	No Data		
Small Business Enterprise (SBE)	15%	0 of 15	0%	0 of 15 pts
Notes -	1. Prime is not SBE certified 2. Prime did not submit good faith effort back up documentation. Total SBE Participation = 0%			
		0 of 100	0%	0 of 100 pts

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	No Data		
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	No Data		
Small Business Enterprise (SBE)	15%	10 of 15	10%	10 of 15 pts
Notes -	1. Prime is not SBE certified. 2. Prime committed to utilize The In Group International, LLC an SBE/MBE Black/Male for construction and technology consulting services at 40% of the total contract award. Total SBE Participation = 40%			
		10 of 100	10%	10 of 100 pts

User RFP Evaluation Results
2021-037-6904 Third Party Administrator for PACE Program
Nancy Martinez

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	No Data		
Administrative Fee Structure	30%	30 of 30	30%	30 of 30 pts
Project Approach and Understanding	30%	No Data		
Small Business Enterprise (SBE)	15%	No Data		
		30 of 100	30%	30 of 100 pts

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	No Data		
Administrative Fee Structure	30%	30 of 30	30%	30 of 30 pts
Project Approach and Understanding	30%	No Data		
Small Business Enterprise (SBE)	15%	No Data		
		30 of 100	30%	30 of 100 pts

User RFP Evaluation Results
2021-037-6904 Third Party Administrator for PACE Program
Jonathon Bazan

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	23 of 25	23%	23 of 25 pts
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	30 of 30	30%	30 of 30 pts
Small Business Enterprise (SBE)	15%	No Data		
		53 of 100	53%	53 of 100 pts

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	25 of 25	25%	25 of 25 pts
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	25 of 30	25%	25 of 30 pts
Small Business Enterprise (SBE)	15%	No Data		
		50 of 100	50%	50 of 100 pts

User RFP Evaluation Results

2021-037-6904 Third Party Administrator for PACE Program

Luis Tamayo

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	18 of 25	18%	18 of 25 pts

Notes - Operating since 2016 working in 10 jurisdictions. Project Experience: Market @ Denton 316-unit MF property reducing e- by 13% and h2o by 30% Maurine @ Wichita Falls - 120-unit MF reducing e- 27% Embassy Suites @ Denton solar installation Other examples. Why no Harris County example? Fees 0.75% Closing fee and 0.1% annual admin fee

Administrative Fee Structure	30%	No Data		
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Project Approach and Understanding	30%	24 of 30	24%	24 of 30 pts
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Notes - Good website with directed communication. Approach is clear from annual report with strong education component.

Small Business Enterprise (SBE)	15%	No Data		
		42 of 100	42%	42 of 100 pts

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	25 of 25	25%	25 of 25 pts

Notes - Large number of counties including Travis. President Heydinger on since 2015. Fees max 0.25% application fee and 0.08% annual admin fee - lower than Lone Star

Administrative Fee Structure	30%	No Data		
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Project Approach and Understanding	30%	29 of 30	29%	29 of 30 pts
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Notes - Understanding of PACE reflected in the diversity of projects throughout the state including Dallas context. Strong process description including pre-application and financial ability check of applicants. Good calendar of events for outreach.

Small Business Enterprise (SBE)	15%	No Data		
		54 of 100	54%	54 of 100 pts

User RFP Evaluation Results
2021-037-6904 Third Party Administrator for PACE Program
Peggy McCormick

Lone Star PACE

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	15 of 25	15%	15 of 25 pts
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	15 of 30	15%	15 of 30 pts
Small Business Enterprise (SBE)	15%	No Data		
		30 of 100	30%	30 of 100 pts

Texas PACE Authority

Criteria	Weight	Score	Percent	Points
Capability and Expertise	25%	25 of 25	25%	25 of 25 pts
Notes -		Already familiar with projects in Dallas County and surrounding counties. 100% of staff time dedicated to PACE program.		
Administrative Fee Structure	30%	No Data		
Project Approach and Understanding	30%	30 of 30	30%	30 of 30 pts
Notes -		Have a proactive approach to working with SBEs and good understanding of the interaction with the Tax Office.		
Small Business Enterprise (SBE)	15%	No Data		
		55 of 100	55%	55 of 100 pts