PAST PERFORMANCE QUESTIONNAIRE:

Attachment to the Notice of Opportunity

CONTRACT INFORMATION (ESCO to complete #1-4 and address and/or location that the questionnaire is to be sent in the customer instructions)

1. ESCO Information:

Firm Name:

Address:

Point of Contact:

Contact Phone Number:

Contact email Address:

2. Work Performed as:

\_\_\_ Prime Contractor \_\_\_Subcontractor \_\_\_Joint Venture \_\_\_Other (Explain)

Percent of project work performed:

If subcontractor, who was the prime? (Firm name/phone #):

3. Contract Information:

Contract Number:

Delivery/Task Order Number (if applicable):

Contract Type: \_\_\_ ESPC \_\_\_Other (Please Specify including FP/CR/Other):

Contract Title:

Contract Location:

Award Date (mm/dd/yy):

Original Contract Acceptance (construction accepted) Date (mm/dd/yy):

Actual Contract Acceptance (construction accepted) Date (mm/dd/yy):

Explain Differences:

Original Implementation Price (excludes finance and service period costs):

Original Contract Price (all costs including design/implementation, finance, and service period costs

Final Contract Price (to include all modifications, if applicable):

Explain Differences:

4. Project Description:

What were the energy or water conservation measures employed in the contract (e.g., lighting, controls)?

What was the complexity of work: \_\_\_High \_\_\_Med \_\_\_Routine?

How is this project similar to the project described in the Notice of Opportunity? (Please provide details such as similar equipment, requirements, conditions, etc.)

CUSTOMER INFORMATION (Agency/Customer/Client/Site to complete #5-7 and Past Performance Questionnaire below)

5. Customer Information:

Name:

Title:

Phone Number:

Email:

6. Describe the customer’s role in the project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Customer’s Signature & Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

INSTRUCTIONS TO CUSTOMER: Please provide responses to the questions below (as applicable) by circling the appropriate adjectival ratings. At the end, please also provide a brief narrative addressing specific strengths, weaknesses, deficiencies, or other comments which may assist an agency in evaluating performance risk (please attach additional pages if necessary). Please submit the completed form directly to the agency requesting the evaluation. Also, please retain the evaluation in case other agencies make a similar request. The Government reserves the right to verify any and all information on this form.

ADJECTIVAL RATINGS AND DEFINITIONS TO BE USED TO BEST REFLECT YOUR EVALUATION OF THE CONTRACTOR’S PERFORMANCE

|  |  |
| --- | --- |
| Rating | Definition |
| **(E) Exceptional** | Performance was substantially and consistently above contract requirements. ESCO displayed an overall superior understanding of contract requirements, and may have used innovative approaches leading to enhanced performance. |
| **(VG) Very Good** | Performance was above minimum contract requirements. Contractor displayed a thorough understanding of contract requirements. |
| **(S) Satisfactory** | Performance met minimum contract requirements. |
| **(M) Marginal** | Performance was below minimum contract requirements. ESCO displayed a lack of thorough understanding of contract requirements in one or more significant performance areas. |
| **(U) Unsatisfactory** | Performance completely failed to meet the minimum contract requirements. ESCO displayed a total lack of understanding of contract requirements. |
| **(NA) Not Applicable** | No information or did not apply to your contract. |

**PLEASE CIRCLE THE ADJECTIVAL RATING WHICH BEST REFLECTS YOUR EVALUATION OF THE CONTRACTOR’S PERFORMANCE.**

|  |  |
| --- | --- |
| **1. QUALITY** |  |
| **Before contract/task order award** |  |
| a) The initial energy audit or Preliminary Assessment provided by the contractor followed the requirements, was of high quality, and showed that the ESCO addressed the customer’s input provided throughout the development process. | **E VG S M U NA** |
| b) The Proposal (including technical investment grade audit and pricing) provided by the contractor followed the requirements, addressed any comments that may have been documented from the initial energy audit, was of high quality, and showed that the contractor addressed the customer’s input provided throughout the development process. | **E VG S M U NA** |
| **After contract/task order award** |  |
| c) M&V Reports were timely and accurate and showed contracted savings were met. | **E VG S M U NA** |
| d) Ability to meet quality design and construction standards specified for technical performance | **E VG S M U NA** |
| e) Timeliness/effectiveness of contract problem resolution without extensive customer guidance | **E VG S M U NA** |
| **2. SCHEDULE/ TIMELINESS OF PERFORMANCE** |  |
| a) Compliance with contract delivery/completion schedules including any significant intermediate milestones (If liquidated damages were assessed or the schedule was not met, please address below.) | **E VG S M U NA** |
| **3. COMMUNICATION** |  |
| a) ESCO was reasonable and cooperative in dealing with client staff (including the ability to successfully resolve disagreements/ disputes; and responsiveness to client requests) | **E VG S M U NA** |
| **4. MANAGEMENT/ PERSONNEL/ LABOR** |  |
| a) Effectiveness of management, including management of subcontractors, suppliers, materials, and/or labor force (including the ability to effectively lead, manage and control the program) | **E VG S M U NA** |
| b) Continuity in the ESCO’s personnel during execution of the contract (e.g., one person or team that stayed with the project throughout the contract) | **E VG S M U NA** |
| **5. COST/ FINANCIAL MANGEMENT** |  |
| a) Ability to meet the terms and conditions within the contractually agreed price? | **E VG S M U NA** |
| b) ESCO proposed innovative alternative methods/processes that reduced cost, improved maintainability or other factors that benefitted the client | **E VG S M U NA** |
| **6. SAFETY/ SECURITY** |  |
| a) To what extent was the ESCO able to maintain an environment of safety, adhere to its approved safety plan, and respond to safety issues? (Includes following the user’s rules, regulations, and requirements regarding housekeeping, safety, correction of noted deficiencies, etc.) | **E VG S M U NA** |
| **7. SUBCONTRACT MANAGEMENT** |  |
| a) Ability to manage subcontracting effort including any subcontracting issues, and the ESCO’s ability to resolve the problems without extensive customer guidance. | **E VG S M U NA** |
| **8. SUMMARY** |  |
| a) Would you hire or work with this firm again? If no, please explain below. | **Yes No** |
| b) Provide an overall rating for the work performed by this contractor. | **E VG S M U NA** |

**Narrative addressing specific strengths, weaknesses, deficiencies, or other comments which may assist our office in evaluating performance risk (please attach additional pages if necessary):**