

**Annex B – Proposal Evaluation Scoring Sheet**

**City Energy Efficiency Lending Program  
Financial Institution Request For Proposal: Proposer Evaluation Worksheet**

<b>Criteria</b>	<b>Point Value</b>	<b>Grade (0-100%)</b>	<b>Score</b>
<b>FI Qualifications &amp; Experience</b>	<b>10</b>		
1 FI proposer experience & qualifications	5		
2 Skills of staff and proposed level of effort	5		
<b>Energy Efficiency Loan Terms &amp; Underwriting</b>	<b>30</b>		
4 Interest rate & fee pricing	10		
5 Loan tenors	10		
6 Underwriting guidelines and security requirements	10		
<b>Approach to Loan Loss Reserve</b>	<b>25</b>		
7 Proposed risk-sharing formula	10		
8 Response on other LRF Agreement terms	5		
9 Broadening access to finance: ability to achieve	10		
<b>Approach to the Program &amp; Marketing</b>	<b>30</b>		
10 Loan marketing	10		
11 Number of accounts/members	15		
12 Loan origination procedures	5		
<b>Other</b>	<b>5</b>		
12 Match of FI's proposal with Program goals:	5		
<b>Total Points</b>		<b>100</b>	

**Evaluator Name & Date:** \_\_\_\_\_

**Financial Institution Name:** \_\_\_\_\_

**Contact Name(s):** \_\_\_\_\_